

Procurement

Source Selection Administration



US Army Materiel Command

FOREWORD

This pamphlet on source selection administration provides information on the organizational aspects of formal source selection. The contents are derived from Army, Air Force, and the National Aeronautics and Space Administration interviews and documentation. This pamphlet has been revised to update the policy on the administrative aspects of formal source selections and to offer ideas and examples to tailor source selection administrative matters to the circumstance of the individual acquisition.

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SOURCE SELECTION ADMINISTRATION

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CHAPTER 1 INTRODUCTION

1-1. Purpose.

a. This pamphlet is designed for those who have responsibilities for the organization and administration of formal source selections. It describes techniques and provides examples of documentation that may be of use to field personnel assigned source selection duties. This pamphlet is intended for the guidance of those who are required to support source selection efforts, particularly members of project management offices, legal counsel, functional directorates, and staff offices of major subordinate commands (MSCs).

b. The provisions of this pamphlet are not mandatory but are based on proven techniques and documentation used by the Army, Air Force, and the National Aeronautics and Space Administration (NASA) in the administrative support of formal source selections. This pamphlet does not provide a single method or document, but useful alternatives. Adaptation consistent with the principles set forth in this pamphlet is encouraged on a case-by-case basis. Tailoring the organization and administration to the specific requirements of each situation will be especially important in the performance of a quality source selection with a minimum investment of money, time, and people.

c. The contents of this pamphlet include discussions of source selection secretariats, personnel considerations, support considerations, budgeting, proposal evaluation standards, lessons learned, various certifications, operating procedures, treatment of present and past performance, and scheduling techniques. This pamphlet does not address the source selection process. Army Materiel Command (AMC) pamphlet 715-3, Vol. I, discusses the source selection process and includes guidance on key personnel and organizations, planning, the function of the solicitation, proposal evaluation, the source selection decision, and acquisition streamlining.

1-2. Applicability. This pamphlet applies to Headquarters (HQ), AMC; AMC MSCs; separate installations and activities reporting directly to HQ AMC; and AMC program/project/product managers (PMs) who have responsibilities for the development, acquisition, and management of materiel.

1-3. References. Required publications are listed in appendix A.

1-4. Explanation of terms. Abbreviations used in this pamphlet are explained in the glossary.

CHAPTER 2 A SOURCE SELECTION SECRETARIAT

2-1. Background. Formal Army source selection organization is ad hoc in nature. The corporate memory on source selections rests with senior contracting, legal, and functional personnel whose time is valuable and limited. However, AMC subordinate activities may adopt the concept of a source selection secretariat (SSS) to institutionalize the source selection corporate memory.

2-2. Air Force and NASA experience.

a. The Air Force and NASA have institutionalized formal source selections by the establishment of SSSs. These are small groups of one or two contracting personnel and one or two clerical support.

b. The SSSs provide continuity and consistency. Their corporate knowledge means more efficient and effective source selections which lead to fewer protests and sustained protests.

2-3. Functions.

a. The SSS can provide support in two ways. It can assist in the area of administrative support and in the area of policy and procedures.

b. SSSs have facilities assigned to their control. The amount of facilities assigned varies. Thus, their administrative functions vary but can include--

(1) Scheduling dedicated source selection facilities and assisting in identifying and obtaining non-dedicated facilities.

(2) Providing conference rooms and visual aids equipment.

(3) Providing equipment such as vugraph typewriters, graphics capability, reproduction, word processors, and furniture.

(4) Providing normal expendable supplies.

(5) Providing badges to be worn by all source selection personnel.

c. Policy and procedure functions can include--

(1) Serving as an advisor to all source selection levels.

(2) Developing activity source selection policy.

(3) Providing comments on and implementing higher level source selection policy.

(4) Assisting in the review of acquisition plans, synopses, source selection plans, solicitations, reports, briefings, and decision documents.

(5) Monitoring progress of source selections and assisting in lessons learned development.

(6) Maintaining records and regulations on source selection, security, prior source selection participants, and contractors' present and past performance.

(7) Developing and maintaining a source selection information guide.

2-4. Sample charter and job description. Appendix B contains the charter for the SSS at the Air Force Systems Command (AFSC), Electronics Systems Division (ESD). Appendix C contains the job description (JD) of the Source Selection Officer (SSO) (GS-1102-14) that heads the ESD SSS. It is understood that other SSOs in the Air Force are GS-1102-13s. The grade of any SSO must be determined by the activity's needs as expressed in the JD contents. Appendix D is the NASA, Marshall Space Flight Center (MSFC), Management Instruction (MMI) 1150.2C that provides the function and authority for the MSFC Selection Evaluation Board/Performance Evaluation Board (SEB/PEB) Secretariat.

CHAPTER 3 PERSONNEL

3-1. Introduction.

a. The success of any human endeavor is determined to a large degree by the personnel involved. The skills, expertise, and experience of the people assigned to formal source selections are the key to its success. AMC-P 715-3, Vol. I, describes the roles of key source selection personnel.

b. The following discussion is based on the evaluation criteria structure described in Vol. I of this pamphlet; that is, "area" to describe the second level of evaluation, which is broken down into "elements" as the third level of evaluation, followed by "factors" as the fourth level of evaluation.

3-2. Key personnel.

a. The key personnel initially are the PM, the contracting officer (KO), and the designated Source Selection Evaluation Board (SSEB) chairperson. The three should determine the tentative areas that will be evaluated, such as cost, technical, and management. Based on personal experiences and contacts in the acquisition community, tentative area chiefs should be identified. Initially, the area chiefs may be local functional personnel, but the final designated area chiefs may be from other organizations.

b. This expanded group can proceed to identify element chiefs and perhaps factor chiefs. It may be preferred to let element chiefs identify factor chiefs and factor chiefs identify individual evaluators. In actual practice, the people higher in the evaluation chain will participate in the personnel selection process.

3-3. Experience and education. A key to the selection process is the identification of the education and experience needs of SSEB personnel at all levels. The required skills and experience should be defined with enough flexibility to substitute training for experience and vice versa. Examples include--

a. Either a particular degree or number of years of experience in a particular field.

b. Either general experience, specific experience, or a combination of both (functional and source selection).

c. A combination of oral and written skills. Particularly, written skills are a must. Editors are hard to obtain.

A PM may have an experienced deputy or assistant who can be the PM's day-to-day representative for organizational matters. The KO in turn may have an experienced contract specialist to rely on as the KO's representative. Selection of personnel requires judgment. If an individual has not served in a particular position before, that should not deter selection. An individual with experience as an evaluator may be now designated a factor chief, and likewise an experienced factor chief may be designated as an element chief and so on up the evaluation chain. The skills and experience need to be delineated with enough flexibility to substitute training for experience and vice versa.

3-4. Personnel database. AMC FAR SUP 15.612-100(a)(3) provides a focal point within AMC to record personnel who participate in formal source selections. There is still no focal point to record an indication of the quality of such participation. The quality of participation can be noted in various ways. Examples are--

- a. Good, average, poor.
- b. Use again, do not use again.
- c. Official performance ratings.

Data should include names, job series, title, grade, position for the source selection, duty station address, and telephone number. This data should be maintained at the MSC level.

3-5. Sources of personnel.

a. The sources of necessary people can vary widely. Sources include the PM office (PMO), the supporting MSC, other MSCs, major commands (MACOMs), MACOM's subordinate activities, Military Departments, and Governmental elements. Non-Governmental sources can include academia, non-profit institutions, and industry willing to be subjected to the organizational conflicts of interests provisions of the FAR SUBPART 9.5.

b. Military personnel involvement is important. Historically, they have served at all levels of the source selection structure. Recent Army initiatives have focused on increased military personnel participation in source selections. Military Occupational Specialities (MOSs) 97, Procurement, and 49, Operations Research and Systems Analysis, as well as Additional Skill Identifier 6T, Materiel Acquisition Management (MAM), personnel are especially suited to source selection because of their subject matter expertise. Combat, combat support, combat service, and support personnel are also important as end user representatives for the item to be acquired.

3-6. Manning levels. Manning should be identified as full- or part-time and when in the evaluation process the manning must be available. The time available to conduct the evaluation can have an influence on manning. Fifty people may be able to do an evaluation in six months. One hundred people may be required if only three months are allocated for the evaluation.

3-7. Management support. Management support is critical to obtain people for the SSEB. This includes the MSC commander and the MACOM commander, if necessary. Managers are reluctant to release personnel for SSEBs, especially if a prolonged evaluation period is projected. Functional area heads are not motivated to support such efforts, because this is not a part of their performance standards. Top management support can alleviate this shortfall.

3-8. Support personnel.

a. Once the primary evaluation team is identified, other personnel may be desired or required. A deputy SSEB chairman, administrative assistant, and other support may be necessary.

b. SSEB chairman, area, element, and factor secretarial support plus the need for a typing pool must be determined. Security custodians, security and special security ("eyes only" messages) personnel may be required. Other personnel that should be considered are visual and video, reproduction, management information systems, transportation, property, and budget personnel.

3-9. Principal formal source selection players.

a. Several people have been mentioned as key players for source selection administrative matters. These people are also critical to the success of the source selection process itself. But there are other players that are introduced as part of the formal source selection process. These players will now be discussed.

b. The Source Selection Authority (SSA) can literally be anyone from the President of the United States to the KO. In practice, this is an individual in the contracting chain of command. Within the Army, this authority rests with the Under Secretary of the Army with the power of redelegation. Although there is regulatory guidance, the decisionmakers can utilize their management prerogatives and redelegate their authorities or withdraw the same for individual acquisitions. Withdrawals of authority can be due to factors such as personal or higher level interest and political sensitivity or directed by higher authority.

c. The Source Selection Advisory Council (SSAC) normally consists of five to ten people. The people are senior military officers and civilian officials noted for their functional and management expertise and business acumen. Many members also have a variety of former source selection experiences. They are essentially the board of directors responsible to the SSA acting as a Chief Executive Officer. The SSAC may include personnel from the MACOM's Headquarters, Department of the Army (HQDA), and other military services in case of joint projects and programs. They must be available for scheduled and called meetings and to meet with SSEB personnel conducting evaluations in their areas of expertise.

d. The SSEB chairperson and key area committee chairpersons are the initial cadre. They must possess proven management and functional expertise plus have previous source selection experience. The ad hoc nature of current AMC formal source selections can make identification of these people a difficult task. In many cases, the same individual will act as chairperson of numerous SSEBs due to his/her proven ability. Unfortunately, this does not provide experience for future SSEB chairpersons. Deputy SSEB chairpersons should be appointed for training and evaluation for future SSEB chairperson duties. This would also provide for unavoidable absences of the SSEB chairperson. This cadre is critical because their responsibilities include--development of the Source Selection Plan (SSP) standards; the solicitation, consistency, and trackability between the SSP and the statement of work (SOW); and the identification of needed skills and people to staff the SSEB.

e. The evaluators can make or break a source selection. The volume of data, analysis, evaluation, and documentation can cause oversights, shortcuts, mental and physical fatigue, unsupportable statements, or evaluations against competing offers rather than against evaluation criteria standards. The foregoing problems can cause rework, a failure to achieve a complete meeting

of the minds between the Government and offerors, delays, frustration, lowered morale, protests, and public criticism. By necessity, these people must be a mix of experienced and inexperienced source selection personnel. If the people assigned as SSEB evaluators do not possess previous SSEB experience, they should have demonstrated ability to work under pressure and deadlines, work with others, apply their expertise in a professional manner, write in a clear and concise manner, and give briefings.

CHAPTER 4
FACILITIES, EQUIPMENT, SUPPLIES, AND SERVICES

4-1. Facilities.

a. The number of people, full- or part-time, required for a source selection will have an impact on the facilities required for a SSEB. One source selection utilized a total of 560 people, 250 of which were at the evaluation site at one time. The space for reproduction, computer, visual aids, and other equipment should be considered while planning for facilities.

b. Once the space requirements are estimated, the problems begin. Most MSCs do not have vacant space available. When vacant space is available, it is frequently inadequate to the point of dilapidation short of abandonment and designation for destruction. Although the most logical evaluation site is the host MSC, in practice, it may not be possible. St. Louis is fortunate to be able to use the St. Louis Area Support Center at Granite City, IL. The Missile Command (MICOM) has dedicated trailers in a security fenced area.

c. Other local Government-owned or leased installations and local commercial structures may be a source of the necessary facilities. A note of caution is that security of source selection sensitive information must be assured at any source selection site. This can create a problem at facilities readily available to access by the general public, such as a General Services Administration (GSA) or commercial structures. It may be necessary to post military, Government, or approved commercial security personnel on a 24-hour basis at the source selection site, regardless of location.

d. If adequate facilities are not available locally, then the possibilities for an evaluation site are literally nationwide. Examples are other AMC installations such as proving grounds and depots, other MACOM installations, GSA conference centers, and other Government agency installations.

4-2. Equipment. Equipment not in place or readily available at or near the evaluation site may not be available as needed for evaluation purposes. An example is computer support. Acquisition lead time may not permit computer support purchases in a timely manner. There may be local Management Information Systems (MIS) hardware and software available from the MIS Directorate, Comptroller, PMO, etc. Generally speaking, the SSEB members bring their duty station MIS resources to the evaluation site. Some Government source selection endeavors have utilized commercial MIS resources after assurance that the provisions of FAR Subpart 9.5, Organization Conflicts of Interest, are met.

4-3. Printing. Reproduction can be provided by equipment installed at the evaluation site; an Adjutant General, field printing plant (AG, FPP); or commercial source. Prior to the use of a commercial source, coordination must be made with the AG, FPP to ensure compliance with FAR Subpart 8.8, Acquisition of Printing and Related Supplies.

4-4. Local transportation. Local transportation usually is a combination of privately owned vehicles (POVs), Government-owned vehicles, and rental vehicles. Maximum use should be made of Government-owned vehicles including GSA. If vehicles must be rented, consideration should be given to weekly, monthly, and long-term rentals if the time frame and vehicle demands of the

evaluation justify such actions. It may be more economical to let a vehicle sit over a weekend on a long-term rental agreement rather than to permit weekly rental. In fact, many source selections involve Saturday and sometimes Sunday work.

4-5. Housing. Housing can be a problem. Although many Government installations have housing available, there are limits on visitors' housing. Usually the SSEB membership must be housed off-post in commercial establishments. It would be prudent to book a block of rooms at a hotel or motel to obtain reduced rates. Redstone Arsenal has a successful program that accommodates the temporary duty (TDY) personnel at rates lower than those previously available to TDY personnel. The Redstone Arsenal program requires the traveler to provide the travel orders (TOs) to the commercial lodging establishment, who then provides the TOs to the billeting office for a non-availability of Government quarters statement, which is provided to the traveler at the time of check-out.

4-6. Other supplies and services. There are other supplies and services that although not critical are important to a successful evaluation effort. The lack of mundane supplies and services such as paper, pencils, vending machines, and janitorial services can cause havoc. That is because dedicated, talented, and hard-working people can thrive on the pressures and challenges of source selection, only to be frustrated by the lack of supplies and services that are assumed to be readily available for everyday needs.

CHAPTER 5 TRAINING

5-1. Current status. Currently, there is no formal on-site training available at the MSCs. There is a wide range of opinions on the necessity, content, and length of source selection training. Current training of source selection personnel is informal, ad hoc, and at the discretion of the key source selection players. Training can vary from on-the-job, through study of the AMC source selection pamphlets and the source selection plan, to briefings by people with source selection experience.

5-2. Necessity, content, and length.

a. Necessity, content, and length of source selection training is dependent on the participant's role (SSEB, SSAC, or SSA) and previous source selection experience. Experienced people may not need training or require only a refresher overview. As a minimum, experienced people should be told of recent regulatory changes and case law that impact their source selection responsibilities. People with no source selection experience may need structured formal training from in-house resources.

b. There is no formula for the content and duration of source selection training. It must be determined by the collective judgment of players such as the PM, SSEB chairperson, and KO plus the advice of legal counsel. The following paragraphs will address various training aids.

c. The Air Force has developed two video tapes on source selection that may be useful to the Army. One tape is an overview and the other is SSEB-oriented including a segment on the development of standards. Availability should be coordinated with the AMC, Deputy Chief of Staff for Procurement (DCSP), point of contact for source selection matters. Other videos are available from commercial source that can be identified by Commerce Business Daily (CBD) announcements.

d. Structured training is available from a number of commercial sources that can be identified by CBD announcements or mailing of the sources' themselves. The problem with commercial sources is that offerings are a mix of Government and industry viewpoints, approaches, and strategies. Another solution is to send one or two cadre people to one or two different courses and then have those people develop appropriate in-house training.

e. The Air Force has developed a source selection training package. The Air Force System Command MSCs will be sent the training package for their use. Air Force Logistics Command will have centralized training of their MSCs cadre who will then return to their duty stations to train source selection personnel. The foregoing recognizes the need for flexibility in source selection training to fit the circumstances. Information on this training package should be requested from the AMC, DCSP, point of contact for source selection matters.

f. A proven training tool is source selection handbooks (HBs) or source selection guides as used by the AFSC product divisions and NASA's MSFC. The AFSC HBs contain all appropriate regulation guidance and local administrative details. The NASA MSFC guide is a series of documents that supplement the NASA SEB Manual, NHB 5103.6A. The titles of the MSFC documents are--

AMC-P 715-3
VOL. II

1. Part 1, An Overview.
2. Part 2, Initial SEB Meetings.
3. Part 3, Presolicitation Activities.
4. Part 4, Solicitation and Receipt of Proposals.
5. Part 5, Initial Committee Evaluations and Reports.
6. Part 6, Initial SEB Evaluation and Written/Oral Discussions.
7. Part 7, Final Evaluations and Reports.
8. Part 8, Presentation to the Selection Official.
9. Part 9, Post-Selection Activities.
10. Part A, The SEB Secretary and the Official File.
11. Part B, Security and Document Control Requirements for SEBs.

CHAPTER 6 BUDGETING

6-1. Background. The cost of formal source selections for major programs or program segment can be substantial. Millions of dollars can and have been spent on individual formal source selections. Appendix E contains a list of budget considerations. The list is not comprehensive, but it is a starting point. Several of the items on the list will be discussed in the following paragraph, after a discussion of some of the people who can influence a good, reasonable, and rational budget. These include the operations or executive officer, the administrative officer, and the budget officer. These people are responsible for the funds and other actions necessary to assure that the day-to-day operations of the source selection are efficient and effective. Sometimes the SSEB chairperson brings a subordinate to act as the operations or executive officer. Generally speaking, the administrative and budget officers are from the host installation. These people must know the local people, places, and procedures to assure prompt and adequate support for the source selection.

6-2. Salaries and Overtime.

a. Military salaries are paid out of a central Army fund, and budgeting for such costs is not required. Technically, the employing activity can require reimbursement of the salaries of civilians assigned to source selections. This should be considered in the budget.

b. Overtime costs can also be substantial because of the volume of work and the press for expedient evaluation. Military do not get paid overtime, but the source selection principals may want to discuss in advance with the activity to which military personnel are permanently assigned some sort of compensatory time. Civil service regulations adequately cover civilian overtime and compensatory time.

6-3. Awards.

a. Military personnel are not eligible for monetary awards unless the provisions of AR 672-20, "Incentive Awards," chapter 4, paragraph 4-1, are met. This paragraph refers to scientific or technological accomplishments. Non-monetary awards for military personnel must also be considered as a matter of equity when compared to their civilian counterparts involved in the source selection.

b. Civilians are normally granted monetary awards per AR 672-20. One source selection had in excess of \$300,000 of a \$3.5 million budget designated for monetary awards.

6-4. Temporary Duty. Many people assigned to source selection are not from the host installation. Thus, TDY TOs must be issued. In budgeting for TDY, it is important to consider the impact of prolonged separation from home or permanent duty stations. Budget development should consider monthly returns of TDY personnel to their permanent duty stations. This can be accomplished by the issuance of blanket TOs per Joint Federal Travel Regulation, Volume I, chapter 2, for military and Joint Travel Regulation, Volume II, chapter 3, for civilians with the approval of the Commander, AMC, or the Commander of an AMC MSC host installation. Blanket TOs permit the PM or host installation to control the commitment of TDY funds and to ease settlements and the final

accounting of the expenditure of TDY funds. Without this morale booster, family and professional relationships can suffer. In one case, five junior officers, graduates of West Point, announced their intentions to resign, based on their source selection observations. The foregoing is cited as an example of the importance of morale and the impact the so called "little things" can have on individuals' morale.

6-5. Rent, lease, or purchase of equipment and sources. Appendix E on budget considerations lists a number of equipments and services. Underestimated leadtimes complicate economical analyses and timely availability. The telephone company or post engineers may have long installation leadtimes and limited telephone lines available. The list of potential problems areas is endless. It should suffice to say that possible adverse situations must be planned for during budget development to minimize their monetary and timeliness impact. It would be prudent to get input from appropriate service segments of the host installation so that they can provide their advice, schedule their resources, and provide practical alternatives.

CHAPTER 7
PERSONNEL PERFORMANCE REQUIREMENTS

7-1. Introduction. There is distinct need for documented performance requirements and evaluations of performance in support of the source selection. The need is dictated to assure that individuals possess needed skills and are aware of their responsibilities and standards by which their performance will be judged. Actual performance must also be documented.

7-2. Performance requirements and standards. Job performance planning worksheets can provide performance requirements for various source selection positions. Appendix F provides samples of Job Performance Planning Worksheets, DA Form 4968, developed for the Light Helicopter Family (LHX) T800-XX-800 Engine source selection. The worksheets are those for the following positions:

- a. Special Assistant for Administration and Support.
- b. Security/Visual Information Officer.
- c. Administrative Assistant.
- d. Administrative Secretary.
- e. Lead Operator.
- f. Typing Pool Member.
- g. Cost Area Secretary.
- h. Deputy Element Chief RAM/ILS Area.
- i. Factor Chief, RAM/ILS Area.
- j. Evaluator, RAM/ILS Area.

The above list is limited but it is only a starting point. A database of such forms should be established by the AMC MSCs, and such databases can be shared between the MSCs and other military and civilian Government activities involved in formal source selections.

7-3. Performance Evaluation. Documentation of actual performance of individuals involved in source selection is needed to award above average performance, advise permanent duty station supervisors of the individuals' contribution to the source selection, and preclude the individuals from missing promotion and developmental assignments. Interim performance ratings of an informal and general nature may be required if the evaluation is lengthy (more than six months). These ratings can be a basis for selection of personnel to staff subsequent source selections.

CHAPTER 8 LESSONS LEARNED

8-1. Purpose. The purpose of lessons learned (LL) in source selection is to document the good and the bad experiences of the source selection so that future source selections can adopt good lessons and avoid bad lessons. The concept has been in existence for years. The problems with DA LLs have included the lack of institutionalization in the form of a controlled publication and dissemination or access by other activities. Vol. III of this pamphlet addresses LLs for AMC in an official pamphlet.

8-2. Current Policy.

a. AMC has addressed past problems with LLs in several ways. AMC FAR SUP 15.612-100 requires an LL report for each formal source selection and the distribution of the report within HQ AMC.

b. AMC-R 11-44, "Army Materiel Command (AMC-AMCSM 1021) Lessons Learned Program," provides for the generation of LLs defined as ". . . the description of an experience, observation, or accomplishment that may be of value and use in an ongoing or future program. In this context, it documents a method of operation which may have wide application among the military services." The Defense Logistic Studies Information Exchange (DLSIE) is designated as the AMC Lessons Learned Data Bank. This data is available from DLSIE in the form of micro-fiche. Users will need a micro-fiche reader and reproduction device if many readers are anticipated in a short time frame.

c. The Air Force Acquisition Logistics Center (AFALC) has an Air Force Lessons Learned Data Bank On-line Access Service which allows users with a remote terminal and modem the capability to directly access the data bank and perform several search, retrieval, and downloading functions. Appendix G contains the letter that announces the service, LLs publications, and a sample of an LL. The AFALC personnel can provide sample forms, regulations, and procedures for documentation and verification of LLs. The Navy and AMC have agreed to become part of the AFALC LL Data Bank.

CHAPTER 9 PROPOSAL EVALUATION STANDARDS

9-1. Background. Evaluation standards establish the minimum acceptable level of compliance with a requirement that must be offered for a proposal to be considered acceptable. Proposal evaluation standards may be either quantitative or qualitative depending on the factor or subfactor they address. Proposal evaluation standards are used for measuring how well each offeror's approach meets the requirements of the solicitation and to determine when an offeror fails to meet or exceeds the solicitation requirements. Proposal evaluation standards are not included in the solicitation and are not to be released to any potential offeror or personnel not directly involved in the source selection. Safeguarding of proposal evaluation standards is required to prevent offerors from obtaining an unfair competitive advantage. After contract award, proposal evaluation standards relating to a specific contract are safeguarded to prevent protests arising from offerors who did not receive the contract and who may seek to refute specific standards.

9-2. Available data. Available data on proposal evaluation standards is currently limited. AMC-P 715-3, Vol. I, appendix E, addresses proposal evaluation standards. Available from DLSIE under LD No. 65038A is an Air Force Institute of Technology thesis on "Developing Source Selection Evaluation Criteria and Standards for Reliability and Maintainability" within the AFSC, Aeronautical Systems Division, and the AFALC. Appendix H contains samples of proposal evaluation standards used by AFSC, ESD. It should be noted that the samples contain Request for Proposal (RFP) references such as the SOW; instructions for proposal preparation (IFPP) contained in the RFP Section L, Instructions, Conditions, and Notices to Offerors or Quoters; and the RFP Section M, Evaluation Factors for Award. The references are used to assure trackability and consistency between critical segments of the solicitation. Appendix I provides AFSC ESD guidance on proposal evaluation standards. Appendix J is AFSC ESD instructions for SSEB personnel for the application of standards to the proposals and the documentation of the resulting evaluation. Appendix J is provided for informational purposes and contains--

FORM	DATE	TITLE
AFSC 402	MAR 85	Factor Worksheet
AFSC 404	MAR 86	Factor Summary
AFSC 411	MAR 85	Item Summary
AFSC 412	MAR 85	Area Summary
AFSC 406	MAR 85	Offeror Response Summary

The legend "FOR OFFICIAL USE ONLY, SOURCE SELECTION SENSITIVE, (when filed in)" refers to competition sensitive information and not to the instructions on the forms as they appear in appendix J.

9-3. Database. AMC MSCs could establish and build a database of proposal evaluation statements used in source selection. It might be useful to include in the database both good and bad proposal evaluation standards. The data bases would be useful in saving time that would otherwise be spent in the development of proposal evaluation standards for source selections.

CHAPTER 10 CERTIFICATES

10-1. Background. Source selections require the execution of various certificates by the participants. These certificates are required by law, regulation, and prudent business judgment.

10-2. Competition Sensitive Information (CSI).

a. Appendix K contains the T800-XX-800 Engine, SSEB, Certificate of Nondisclosure. Appendix L has the T800-XX-800 Engine, SSEB, Rules of Conduct. AMC FAR SUP 15.612-100(c) also contains a rules of conduct statement.

b. AMC FAR SUP 15.612-100(c) provides a nondisclosure certificate and a rules of conduct statement.

c. For informational purposes, appendix M is a generic version of the guidance on the protection of CSI issued for the T800-XX-800 Engine.

d. Appendix N contains a sample of a NASA, MSFC, letter signed by the Director to all MSFC personnel on the procurement sensitivity of the MARS Observer Flight System Requirement. It should be noted that the RFP was issued by the Jet Propulsion Laboratory in California, whereas MSFC is located on Redstone Arsenal, Huntsville, AL. An AMC parallel example is a tank or helicopter that is acquired by one MSC but is supported by other MSCs for electronics and weapons.

10-3. Conflict of interest certificate.

a. An important certificate is the conflict of interest certificate. All source selection personnel, professional and clerical, should sign such a certificate, especially the SSA and SSAC. The decision and decision-influence roles of the SSA and SSAC make the filing of a conflict of interest certificate imperative.

b. Appendix O contains the T800-XX-800 Engine SSEB statement of financial interest.

c. For informational purposes, appendix P contains the NASA Employees (other than Special Government Employees) Confidential Statement of Employment and Financial Interests (NASA Form 1270) and its Information/Instruction Sheet. It may prove useful in the development of local financial interest statements.

d. AMC FAR SUP 15.612-100(c) also contains a conflict of interest certificate.

10-4. Knowledge certificates. Critical to any source selection is the participants' knowledge and understanding of the rules, regulations, and documents that apply to the acquisition subject to source selection. A sample of a knowledge certificate is furnished in appendix Q.

10-5. Combined certificates. Rather than have source selection participants sign a multitude of forms and certificates, it may be more efficient to combine certificates. Examples are provided in appendix R, NASA, MSFC,

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Professional Individual Certificate for Source Evaluation Board Participant
and appendix S, NASA, MFSC, Clerical Individual Certificate for Source
Evaluation Board Participant.

CHAPTER 11
BOARD OPERATING PROCEDURES AND OTHER DOCUMENTS

11-1. Board Operating Procedures (BOPs). The orderly discharge of the source selection process can be enhanced by the use of BOPs. Appendix T is a generic version of the set of BOPs used by the T800-XXX-800 Engine SSEB. The BOPs are as follows:

<u>BOP Number</u>	<u>Title</u>
1	Personnel In-Processing Procedure
2	Security Procedures
3	Standards of Conduct
4	Parking
5	Use of Telephone
6	Hours of Duty
7	Time and Attendance Reporting
8	Claim For Reimbursement for Expenditures on Official Business Standard Form 1164
9	Control of Reproduction
10	Typing Pool Procedures
11	Offerors RFP Clarification
12	Error, Omission, or Clarification (EOC) Reporting
13	Amendments to RFP
14	"Eyes Only"/Back Channel Messages
15	LL Reports
16	Departure Clearance Procedures

11-2. Other documents. Appendixes U through X provide samples of documents used to document the T800-XXX-800 Engine SSEB work. Samples are provided of a summary score sheet, factor sheet, subfactor sheet, and evaluation sheet definitions.

CHAPTER 12
PRESENT AND PAST PERFORMANCE

12-1. Background. Consideration of an offeror's present and past performance is permitted by Department of Defense Directive (DODD) Number 4105.62, "Selection of Contractual Sources for Major Defense Systems." DODD 4105.62, paragraph E.3.f.(1), states in part, "The offeror's recent and relevant past performance (measured by such indicators as quality, timeliness, cost, schedule, operational effectiveness, and suitability) may be considered in assessing the probability of successful accomplishment of the proposed effort in a timely and cost-effective manner." This policy statement is the easy part. The hard part is implementation. Everyone in the acquisition source selection business has an opinion--from it will work to it cannot work. If the acquisition system decisionmakers decide to use past and present performance, the implementors of that decision may want to adapt the procedures used by the AFSC ESD discussed in the following paragraph.

12-2. Contractor performance database. There is no known DOD or DA focal point for a contractor performance evaluation program (CPEP). At least one AMC MSC production directorate has a program for production contracts. If an AMC MSC elects to establish or refine a existing database for a CPEP, consideration should be given to AFSC ESD Regulation 178-1 reprinted in appendix Y. A review will show that the appendix is research and development oriented. The AFALC at Wright-Patterson Air Force Base, OH, has a similar program which is production contracts oriented.

12-3. Source Selection Team. AF source selections use a Present and Past Performance Team (PPPT) of a few people that report directly to the SSEB chairperson. The team utilizes data from--the ESD database; information submitted by the offerors (see AMC-P 715-3 Vol. I, appendix J, pages 111, 122, and 123); data extracted from the HQ AFSC printout of contracts; and evaluations solicited from procuring and administrative contracting officers and program managers, customers, other AFSC product division and other AF, military, and civilian agencies. Data is gathered on major and critical proposed subcontractors. Out of the pool of contracts from the foregoing source, the PPPT selects a number of contracts on which to get detailed cost, schedule, technical, etc., data. In one case, 21 programs of one contractor and 27 programs of another contractor formed the PPPT input to the SSEB chairperson. The data is considered a general consideration for evaluation purposes. See appendix Z on an extract from AF Regulation 70-15, ESD Supplement 1, on the treatment of present and present performance in source selection.

12-4. Executive In-Plant Review Team (Greybeards).

a. The AFSC, ESD, utilizes a group called the Greybeards. The Greybeards are a small group (approximately three) of senior Government and non-Government advisors appointed by the SSA to visit each offeror's facility (principal place of performance) to assess the offerors' ability to successfully execute the contract. The Greybeards may not serve on the SSEB. The minimum advance notice to offerors in the competitive range of the Greybeards' visit is one day. The team findings are briefed separately, as a general consideration, at the time of the SSAC's post best and final offer briefing to the SSA. A narrative of the team's findings are incorporated as an addendum to the SSAC's analysis report to the SSA.

b. Areas addressed by the Greybeards include--

- (1) Organizational placement of the program management team in the company's structure.
- (2) The program management organizational structure.
- (3) The program manager's plan to manage and control the program.
- (4) System architecture and technical design and tradeoffs considered.
- (5) System integration plans and risks with emphasis on software and integration testing.
- (6) Analysis of the master schedule (critical path and slack areas).
- (7) Assessment of management, technical, cost, and schedule risks and associated contingency plans.
- (8) Plans for management of subcontractors and equipment vendors.
- (9) Contingency plans if a subcontractor fails to perform.
- (10) Approaches to logistics support and warranties.
- (11) Qualifications of key people and manning plans.
- (12) Similar work the company has done in the past and its degree of success or failure.
- (13) Corporate commitment to the program in the face of cost overruns.
- (14) Relationship between the program team and the proposal team.

c. The AFSC ESD Greybeards have provided many useful LLs that can be used as a checklist for future applications of the concept. The LLs include--

- (1) A surprisingly large number of companies that limit top management tracking of a program's "health and well being" to financial and schedule tracking only.
- (2) Many companies that have no management system to track software status and some that do have such a system do not assess trends.
- (3) Weak software teams and weak software management.
- (4) Splitting software efforts between physically separated prime and subcontractors causing high risk, particularly detrimental to system integration.
- (5) Offers of ADA computer language with no or essentially no ADA experience in the company, including an inadequate understanding of support tools (sometimes true of other languages).

(6) Offerors knowingly accepting unachievable Government schedule requirements to avoid being non-compliant with the solicitation.

(7) Software schedules that are overly optimistic. This is particularly true when requirements are poorly defined.

(8) Many subcontractors lacking a basic understanding of Government software documentation specifications and standards.

(9) The use of four or five prime contractors during research and development which is sometimes ineffective.

(10) System reliability and availability calculations frequently assuming that the software is perfect.

(11) Stress tests that are not planned early enough in the system development cycle to evaluate software.

(12) General lack of top management sensitivity to the importance of software to overall program success.

(13) Offers of equipment as off-the-shelf when the equipment is still in development or is serial number one.

(14) Program managers that do not have the experience to manage the program and/or key sub-area managers that are not experienced.

(15) Program management authority that is diluted within the company's functional matrix structure to the point that the program manager is only a program coordinator.

(16) Program managers that are billed as program managers, but real authority is vested in the company financial managers.

(17) Control of vendors and suppliers managed by the contracting and financial matrix. Control is removed from the program manager's authority.

(18) Warranties are that poorly thought through. They read like marketing "puffery."

(19) Lack of contingency plans if critical subcontractors fail to perform.

(20) Underestimation of the time required and complexity of the system integration testing tasks.

(21) Confusing and poorly planned prime and principal subcontractor(s) management relationship and work sharing.

(22) Lack of ability (more likely willingness) to identify management, technical, cost, and schedule risk to the Government up front and/or to prepare reasonable contingency plans to minimize the impact of risk.

(23) Program management teams assigned to implement the program that are not the team that prepared the proposal.

d. The foregoing LLs can be summarized as follows:

(1) Major disconnects between a company's capabilities and its offer is a common occurrence.

(2) The Greybeard process has a positive impact on company management.

(3) The limitations of the Government source selection process are better understood (the process is discussed with the company).

(4) Government contributions to program risks are frequently uncovered.

(5) The Greybeard process makes a significant contribution to improvement of the Government source selection process (feedback from industry to Government source selection specialists).

12-5. Other input data. The AFSC ESD may also use input data from a pre-award survey (PAS), an expanded PAS (the Defense Contract Administration Services PAS team is supplemented by AF functional specialists), or manufacturing management/production capability reviews.

CHAPTER 13 SCHEDULES

13-1. Background. It is important to establish realistic schedules for the conduct of formal source selections. This should include--identification of the membership of the various evaluation bodies; availability of the membership at the evaluation site; development of the evaluation plan and solicitation; issuance of the solicitation; proposal preparation and receipt; the actual evaluation of proposals; negotiations and final reviews, approvals, and contract award.

13-2. Scheduling techniques. Planning, scheduling, and controlling of a project can be accomplished by using a schedule that may range from a simple milestone chart to a more complex networking technique. For simple scheduling problems, GANTT charts can be used. Critical Path Method (CPM) and Program Evaluation and Review Technique (PERT) are two older networking techniques which are available. For simple problems, when activity completion time is known, the CPM technique is sufficient. If the activity completion time is not known with certainty, the network technique assumes a probabilistic nature in regard to completion time. PERT is employed to analyze this type of network. PERT enables development of a more realistic model than CPM, but it assumes that every activity will be completed successfully. For some projects (e.g., research and development), this may not be true. A realistic network representation would be one that would allow the events as well as the activity time to be modeled probabilistically. The Venture Evaluation and Review Technique (VERT) is such a technique. VERT is a mathematically oriented simulation networking technique that is designed to assist in the assessment of the risk associated with time, cost, and performance characteristics of a system. The U.S. Army has VERT computer programs which are available for both a mainframe and a personal computer (PC). Assistance with the program or a copy of the program can be obtained by contacting the U.S. Army Logistics Management Center, School Logistics Science, Fort Lee, VA.

The proponent of this pamphlet is the U.S. Army Materiel Command. Users are invited to send comments and suggested improvements on DA Form 2028 (Recommended Changes to Publications and Blank forms) to the Commander, USAMC, ATTN: AMCPP-SP, 5001 Eisenhower Avenue, Alexandria, VA 22333.

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Appendix A

References

Required Publications

Federal Acquisition Regulation (FAR)

Department of Defense Directive 4105.62
Selection of Contractual Sources

Joint Federal Travel Regulation

Joint Travel Regulation

AR 600-50
Standards of Conduct for Department of the Army Personnel

AR 672-20
Incentive Awards

Army Materiel Command (AMC) FAR Supplement

AMC Regulation 11-44
Army Materiel Command (AMC-AMCSM 1021) Lessons Learned Program

Appendix B

Air Force Systems Command, Electronic Systems Division, Source Selection
Secretariat

Directorate of Contracting Policy
Deputy for Contracting
HQ Electronic Systems Division (AFSC)
Hanscom Air Force Base, MA 01731

PKP DOI 70-3
July 1985

Contracting

Source Selection Secretariat

This instruction delineates the responsibilities of the Source Selection Secretariat in providing contractual, technical, and administrative support to formal source selections and other competitive negotiated acquisitions.

1. General. The Source Selection Secretariat (SSS), an organization under the direction of the Directorate of Contracting Policy (PKP), is designated to establish and administer source selection policies and procedures. The SSS provides administrative and technical procurement support to Source Selection Advisory Councils (SSACs), Source Selection Evaluation Boards (SSEBs), and Source Selection Evaluation Committees (SSECs), so as to accomplish the total source selection task, including evaluation of proposals. The SSS coordinates and manages ESD support to SSEBs/SSECs. The SSS is staffed with the Source Selection Officer (SSO), and a Procurement Assistant. The SSO serves as the chief of the SSS, and is responsible for all matters relating to the source selection process.

2. Scope:

a. The procedures and responsibilities outlined in this Operating Instruction are applicable to all formal source selections conducted at the ESD Source Selection Secretariat; Building 1217, Hanscom AFB, MA or the Waltham Federal Center. Formal source selections not conducted at Building 1217 or Waltham, because of space or other limitations, will be provided the same support provided at either of the ESD SSS facilities, except that the administrative services identified in paragraph 3.a. below will not be available.

b. The SSS will also monitor and assist all competitive negotiated acquisitions not using formal source selection procedures (i.e., AFSCR 80-15) on an as-required basis, and will be prepared to advise PKP, PK, CC or other executive management levels on the status of these acquisitions.

3. The Specific Responsibilities of the SSS are:

a. Administrative

(1). Schedule use of the source selection facilities and assign specific work areas within Building 1217 or at Waltham.

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(2). Provide conference room, with viewgraph presentation capability, for use by SSEBs, SSECs, and SSACs on first come, first served basis. Those SSEB's conducting their evaluation at other than Building 1217 or the Waltham facility may also request use of the SSS Conference Room.

(3). Maintain and schedule use of one viewgraph typewriter for use by the SSS and ongoing source selections. A graphics capability will also be provided; however, each SSEB will provide its own vellums.

(4). Maintain a reproduction capability and establish a register to log users and number of copies.

(5). Provide normal supplies such as paper, pens, pencils, staples, paperclips, etc. Any non-consumable supplies shall be provided on hand receipts to individual source selection groups. The Chairperson of the SSEB/SSEC or his/her administrative officer shall be responsible for the control and return of non-consumable supplies. Shortages shall be replaced by the responsible Program Office. A nominal quantity of source selection forms will be provided to each group. Each SSEB/SSEC may obtain additional forms through the Publication Distribution Office (3245th ABG/DAPD).

(6). For SSEBs utilizing Building 1217, one CPT word processor and printer will be made available to each evaluation group. The SSS (Bldg 1217) also has a TEMPEST word processor and printer for those SSEBs with classified requirements. SSEB's utilizing facilities other than Building 1217 are responsible for providing their own word processing equipment.

(7). The SSS will provide badges to be worn by all source selection personnel, and will ensure that SSEBs/SSECs establish proper security procedures.

(8). A nominal amount of furniture (e.g., tables, chairs, file cabinets, coat racks) will be provided to each SSEB when available. However, since a sufficient number of classified storage containers will not be available at either of the SSS facilities, each SSEB must plan to provide these containers (safes) to satisfy their own needs. The responsibility for acquiring additional furniture remains with each SSEB/SSEC. Each evaluation group must provide for the manpower support necessary to arrange furniture to suit their individual needs regardless of whether their source selection is conducted in the SSS, at Waltham, or at some other location. Further, each group will also arrange for the manpower and transportation support necessary to locate any additional furniture not provided by the SSS.

b. Policy and Procedures:

(1). Serve as advisor to SSAs/SSACs/SSECs on all source selections.

(2). Develop and/or modify ESD policy on source selection, either on the SSS's own initiative, in response to specific requests/direction of the Commander, ESD or Deputy/Assistant Deputy for Contracting, or in response to developing trends.

(3). Implement source selection policy at ESD, as promulgated by higher headquarters (AFSC, USAF, OSD). The SSS will also provide higher

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headquarters (through appropriate channels) with comments/recommendations on existing and proposed source selection policy.

(4). Assist with the review of Acquisition Plans and Synopses to assure consistency and compliance with source selection procedures.

(5). Provide guidance and assistance to Program Offices and PCOs in the preparation of source selection plans and schedules.

(6). Serve on Business Strategy Panels, as required.

(7). Serve as Advisor to Solicitation Review Panels (Murder Boards), as required.

(8). Review solicitations (RFPs), with particular emphasis on traceability of requirements from the Executive Summary Letter through Section M (Evaluation and Award Criteria) to Section L (Instructions for Proposal Preparation).

(9). Brief SSACs, SSEBs, and SSECs on source selection regulations and procedures, security requirements, and standards of conduct.

(10). Assist SSEBs/SSACs in their development of factors and standards.

(11). Provide guidance during the course of the source selection evaluation in the capacity of advisor to the SSA, SSAC, SSEC, and SSEB. This guidance will include, but not be limited to, the following areas:

(a) Generation of Deficiency Reports and Clarification Requests.

(b) Preparation of SSEB/SSEC Evaluation Reports, and SSAC/SSEC Analysis Reports.

(c) Preparation of briefings to SSACs and SSAs.

(12). Attend briefings to the SSA/SSAC. Implement corrective actions, as necessary, based on comments and observations of the SSA. Coordination with PK and PKP will be effected to keep those offices apprised of significant developments.

(13). As requested, accompany the SSA when briefings to higher headquarters (AFSC, USAF, SAF, etc.) are required, to enable the SSS to assure that source selections are responsive to the needs of the SSA and higher headquarters.

(14). Provide guidance and assistance to SSAs, SSACs, and SSECs in the preparation of decision documents.

(15). Advise the Deputy for Contracting and the ESD Commander on source selection policies and procedures.

(16). Review proposed debriefings to unsuccessful offerors and, based on SSO availability, brief the Source Selection process utilized to each unsuccessful offeror.

(17). Monitor progress on ongoing source selection(s). Document reasons for delays, problems encountered and analyze same with objective of preventing future reoccurrences.

(18). Provide guidance/assistance to PCOs and Program Offices involved in other competitive negotiated acquisitions (DAR 3-805; AFSCR 80-15).

(19). Maintain ESD and headquarter's regulations on source selection. Review all regulations to assure consistency with source selection procedures, sensitivity, and security requirements.

(20). Maintain records of prior SSAC, SSEC, SSEB membership. Make membership recommendations based on program requirements and talent/expertise required. Assure that appropriate personnel understand that individuals appointed to SSACs, SSECs, and SSEBs will be available for the duration of the source selection.

(21). Maintain and update Annual Source Selection Certificates for senior ESD officials (e.g., Deputies, JA) and other individuals repeatedly involved in the source selection process by direct participation or through job function.

(22). Present periodic briefings on pertinent source selection items at ESD Contracting Conferences.

(23). Present a source selection overview to each Acquisition Management Orientation Course (AMOC).

(24). Prepare source selection reports as required.

(25). Maintain and provide (on a loan basis) a Source Selection Handbook to the Chairperson of the SSEB/SSEC. This Handbook will provide, in a capsule form, an outline of the process and the SSEBs/SSACs/SSAs responsibilities/duties.

/s/
ROBERT J. BOWES, Director
Directorate of Contracting Policy
Deputy for Contracting

Appendix C

Air Force Systems Command, Electronic Systems Division, Source Selection Officer, Position Description

POSITION NUMBER: 8-22682-0

ORGANIZATION: USAF, AFSC, ESD
Deputy for Contracting
Directorate of Contracting Policy
Hanscom AFB, MA 07313

POSITION TITLE: Procurement Analyst

CLASSIFICATION: GS-1102-14

CLASSIFIED BY: /s/Carolyn E. Speese

DATE: 6/6/85

DUTIES AND RESPONSIBILITIES (Indicate time percentages where required) (Questions concerning the classification of your position should be asked of your supervisor. You may see, upon request, classification standards and guides used in classifying your job. Appeal rights and procedures are explained in Federal Personnel Manual, Chapter 511, Subchapter 6 and AFR 40-512.)

I. INTRODUCTION

CLC: C014

- This position is located in the organization cited above. The organization function is outlined in the ESD Organization and Functions Chart Book.

- The incumbent serves as the Source Selection Officer (SSO) in the Source Selection Secretariat (SSS), Directorate of Contracting Policy (PKP).

II. DUTIES AND RESPONSIBILITIES

- Incumbent performs technical supervision and reviews the work of the GS-13 Source Selection Engineer (SSE) and the SSS Procurement Assistant (GS-1106-06).

- The SSS Procurement Analyst is primarily responsible for developing implementing and monitoring source selection policies and procedures that will enhance the Government's ability to accomplish competitive negotiated source selections.

- The SSO is responsible for assisting and guiding contracting and program office personnel through the complex source selection process; reviewing/evaluating acquisition plans for requirements above \$100,000 and recommending approval by the Deputy for Contracting, and reviewing/coordinating all Source Selection Plans (SSPs) prior to final coordination by the Deputy for Contracting.

- The SSO recommends, develops and implements ESD policy to assure that source selections are accomplished in accordance with AFR 70-15, and the AFSC and ESD supplements thereto.
- Incumbent possesses an in-depth knowledge of all ongoing and pending source selections, and provides necessary guidance to contracting and program office personnel.
- Incumbent routinely prepares source selection training aids which are implemented throughout DOD.
- Incumbent is subject to briefing all DOD agencies at headquarters level regarding intricacies associated with source selection procedures.
- Incumbent prepares detailed data on status of source selections for use by the Deputy for Contracting and the ESD Commander. Also responsible for preparation of reports and responses to inquiries from higher headquarters.
- Employee either personally conducts, or supervises the accomplishment of PCO/Buyer training sessions for the purpose of disseminating most current source selection policy and procedures.
- Serves as representatives of the Deputy for Contracting and the ESD Commander on all source selection matters.
- Incumbent works under the general direction of the Deputy Director of Contracting Policy. Incumbent has broad authority in establishing procedures for conducting source selections at ESD.

III. FACTORS

- Mastery of acquisition regulations and contracting principles including the latest procedures and techniques. For example, the employee is expert at concepts such as incentive arrangements, life cycle cost, warranties, supportability and source selection procedures and ensures that a proper balance is maintained and presented to the selecting authority. The employee is the recognized expert and contractual authority on the broad ranging concept of competitive negotiations, selection and contract award.
- The position requires a mastery of contracting methods and types and mastery of the contracting function to a degree that is sufficient to apply experimental theories and new developments to problems not susceptible to conventional solutions; and, to ensure these concepts are recognized and properly considered in the competitive selection process. Incumbent is regularly expected to explain these concepts and their implications to senior Government and industry leaders.
- The incumbent has managerial and coordinating skills to control a significant volume of contractual selection actions occurring simultaneously and/or overlapping with others, maintaining complete knowledge of all.

- The analyst has a comprehensive knowledge of related disciplines and functions involved in the systems acquisition process, such as design and systems engineering, integrated logistics support, financial management and their interrelationship to contract. Employee is able to translate this knowledge to provide expert contracting technical oversight to the SSE and personnel involved in competitive source selection acquisitions. The SSO is recognized for a high competence with business strategies, program and technical requirements and is expected to direct the proper in-depth evaluation of financial and technical capabilities and anticipated performance of competing contractors.

Factor 2 - Supervisory Controls - Level 2-5 - 650 Points

- The supervisor is available for consultation on procurement policy interpretations. The employee is responsible for carrying out all activities required to ensure source selections are timely and properly conducted. Decisions and recommendations of the employee are normally accepted as authoritative. The employee independently determines approaches and methods necessary to satisfy the ESD mission and to respond to headquarters, congressional and contractor queries/taskings. Employee is solely responsible for the development and currency of all policy relating to competitive negotiations and selection. The employee independently carries out the work, coordinating with all involved activities. Review of work focuses on compatibility with management objectives, fulfillment of acquisition and contracting objectives and attainment of selection processes consistent with HQ ESD, AFSC and higher headquarters' policies and objectives. Because of the employee's recognized technical expertise, the employee is able to secure verbal approval for changes in evaluation and selection procedures both within ESD and from higher headquarters when variation is deemed critical by the employee.

Factor 3 - Guidelines - Level 3-5 - 650 Points

- Guidelines consist of broad policy statements, the Defense and Federal Acquisition Regulations, AF Regulation 70-15 and a plethora of supplements and complimentary regulations. The employee must also have working familiarity with directives and regulations that guide other disciplines and impact the evaluation and selection process. The employee recognizes when procedures must be developed to effect viable program strategies and enhance competition. The employee is an authority in the development, implementation and interpretation of acquisition and contracting directives, policies, regulations and impacting legislation. As new concepts and strategies are developed, the employee devises methods and solutions for their evaluation. The employee's involvement in the preparation of training materials, which are implemented throughout DOD, leads all agencies to seek the incumbents advice when establishing policy. Incumbent recommendations directly impact all DOD guidelines. These methods and procedures can be proposed to and accepted by higher headquarters as standards for command-wide use.

Factor 4 - Complexity - Level 4-5 - 325 Points

- The work involves the planning, directing and coordinating of a significant number of source selection actions for complex command, control

communications and intelligence systems. The employee is responsible for review and assess the effectiveness of all source selection activities, providing counsel to all source selection advisory councils and selecting authorities on the adequacy of the methods and results achieved. The employee coordinates the efforts of all subject matter specialists engaged in the acquisition and selection process and is solely responsible for insuring that multiple (simultaneously and overlapping) acquisitions are brought to fruition through the formal selection process in a timely and efficient manner.

Factor 5 - Scope and Effect - Level 5-5 - 325 Points

- The purpose of the work is to develop policies and methods and resolve critical problems in the planning, negotiating, evaluating and awarding of formal, competitive acquisitions. Recommendations are accepted as authoritative. The work typically requires developing acquisition regulations, extending techniques and interpreting policies for all acquisition (e.g., contracting, financial, technical, program management) and senior management personnel. The employee's work impacts not only the immediate ESD environment but also all of HQ AFSC and AF. Training and briefing materials developed by or under the guidance of the incumbent, become the standard for use within the Air Force and other Departments. New evaluation techniques and standards for conducting formal negotiations with industry are developed to meet the ever changing acquisition process as it is affected by legislation, regulation and policy guidance.

Factor 6 - Personal Contacts - Level 6-4 - 110 Points

- Personal contacts regularly involve contracting and technical program personnel, senior civilian (SES) and military (General Officer) personnel from all military services and many civilian agencies, senior foreign Government representatives and industry leaders. The employee participates in Government and public conferences attended by top level representatives of both industry and Government. The incumbent regularly interfaces with all senior ESD personnel (including the Commander and Vice Commander) on all aspects of competitive, negotiated acquisitions.

Factor 7 - Purpose of Contacts - Level 7-4 - 220 Points

- Contacts are to serve as the corporate expert in planning and executing significant competitive acquisitions through formalized source selection procedures. This involves meeting with senior representatives and program personnel to strategize selection and evaluation techniques, levels of selecting authority and depth of procedures to be used. The incumbent also explains the evaluation and selection process to comparable levels of industry representatives. The employee's positions on selection matters are accepted as authoritative. The employee represents the Division and/or headquarters on task forces or conferences dealing with selection techniques and methodologies.

Factor 8 - Physical Demands - Levels 8-2 - 20 Points

- Work is generally sedentary, but very often incumbent must participate in lengthy meetings and briefings which may run from three to seven hours, frequently concluding four to five hours after regular working hours. Employee periodically works significant hours beyond the normal duty day and duty week, extending to six or seven day week when required.

Factor 9 - Work Environment - Level 9-1 - 5 Points

- Work Environment only everyday risks and discomforts. By exercising routine precaution in office or conference room environment, employee can avoid all hazards.

OTHER SIGNIFICANT FACTS

- TDY may be required for work assignments or formal training, using commercial or Government aircraft.

- Employee is required to file a DD Form 1555.

- This is a contracting career position and is subject to the staffing mobility provisions of AFR 40-303 and its AFSC supplement.

Total points: 3,855

Appendix D

National Aeronautics and Space Administration, Marshall Space Flight Center,
Source Evaluation Boards and Performance Evaluation Boards Functions and
Authority

Management Instruction

George C. Marshall Space Flight Center
Marshall Space Flight Center, Alabama 35812

Originating Organization: AP04

MMI 1150.2C

Subject: FUNCTIONS AND AUTHORITY - SEB/PEB SECRETARIAT

1. PURPOSE

This Instruction delineates the responsibility, functions, and authority assigned to the SEB/PEB Secretariat in support of the Center's Performance Evaluation Boards (PEB) and Source Evaluation Boards (SEB).

2. ORGANIZATIONAL LOCATION

The SEB/PEB Secretariat will be responsible to and will function under the supervision of the Chief, Policy and Systems Review Office, Procurement Office (AP04).

3. RESPONSIBILITY

The SEB/PEB Secretariat is responsible for:

- a. Providing general and special guidance and assistance to the Chairmen and Members of MSFC PEB's and SEB's.
- b. Assuring that Center-developed policies and procedures for PEB's and SEB's are consistent with the regulations and guidelines published by higher authority and are applied in a uniform manner.
- c. Providing, as assigned, secretariat and related services to PEB and SEB Chairmen.
- d. Maintaining official records for all PEB and SEB proceedings, findings, and/or recommendations.

4. FUNCTIONS

The SEB/PEB Secretariat will:

- a. Perform a continuing review of all publications relative to PEB and SEB activities to ensure currency, accuracy and uniformity.

- b. Provide SEB Chairmen copies of the NASA Source Evaluation Board Manual (NHB 5103.6A), the MSFC SEB Booklet and any other instructions pertinent to the Board's operations.
- c. Provide to personnel responsible for evaluating contractor performance copies of the MSFC Performance Evaluation Operating Manual for CPAF Contracts (MM 5151.5B) and any other instructions pertinent to the evaluation process.
- d. Provide guidance and instructions in areas involving sensitive, cautionary and mandatory requirements, policies and decisions; be responsive to all requests for assistance.
- e. Maintain a current list of PEB and SEB participants and their specific appointment(s).
- f. Coordinate and schedule all PEB and SEB presentations to Center and NASA Headquarters management personnel as appropriate.
- g. Coordinate the timely preparation and delivery of PEB and SEB evaluation documentation to appropriate personnel. Ensure that the news release and the notification of the successful and unsuccessful proposers are available at the time of source selection.
- h. Prepare the final PEB report, recommendations and findings and coordinate the documents with appropriate PEB personnel for concurrence and/or approval.
- i. Provide administrative support to the MSFC PEB's and the SEB Advisory Council.
- j. Maintain the official repository for PEB and SEB documentation, e.g., official records of proceedings and findings, as well as current directives, policies, procedures, and regulations.
- k. Furnish to Public Affairs Office date of SEB findings presentation to Source Selection Official, date of source selection and time proposed for notifying offerors. After source selection provide Public Affairs Office the name of the successful and unsuccessful offerors and the successful offeror's proposed amount of the total contract period of performance. Should two or more firms be selected for final negotiations, the dollar amount furnished will be stated in general terms (e.g., the dollar value of this procurement is expected to exceed \$).

5. SCOPE OF AUTHORITY

The SEB/PEB Secretariat is authorized to take all necessary action to carry out assigned responsibility and functions within such limitations as may be established by Center management and applicable law or regulations.

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6. RECISION

This Instruction supersedes MMI 1150.2B.

/s/W. R. Lucas
Director

Distribution
MDDL 1
Special (20 copies to AP04B)

Appendix E

Budgeting Considerations

In preparing an estimate of funds the following should be considered:

Salaries and overtime	Include out of town and local Commands.
TDY	Travel, per diem, rental cars, in and around mileage, and round trips to home stations.
Local travel	See para C2153 of JTR.
Purchase equipment	Which equipment will be retained by the PMO after the Board is disestablished? Is it more economical to purchase rather than lease?
Rental equipment	Must determine most economical piece of equipment to meet the needs of the SSEB. Rent? Lease? Purchase?
Equipment required	Wordprocessors/calculators/typewriters/graphics/computers/datafax, audio visual.
GSA supplies	All supplies are to be purchased in the GSA store.
Other supplies	Supplies that must be purchased through procurement because the supplies are not carried in the GSA Store.
GSA vehicles	The rental of a GSA vehicle for general use by the SSEB.
Communications	Cost to install telephones and/or telephone hookups for any needed computer equipment/Toll/FTX/WATS/AUTOVON charges, etc.
Facility and/or remodeling thereof	Determine if the building and/or any remodeling that may be needed is paid by the host commander.
Janitorial services light/heat/water, etc.	Determine if rent is charged to the PM or paid by the host commander. Same for janitorial service/light/heat/water, etc.
Contracts	If required during the SSEB, any contracts for outside Government printing, graphics support, editors, block of hotel rooms, consultants, etc.

Other

The copier repairman to service machines after normal duty hours/cost to move Government-owned equipment to SSEB location.

Overtime to cover personnel outside SSEB members (DMIS/printing).

Purchase order established for quick purchase of graphic supplies.

Cost to ship needed documents to other locations via over night or next day shipping.

Employee recognition and monetary awards.

Office supplies.

Security requirements including badges.

Also, the following miscellaneous items are budget considerations:

Vending machines
Emergency data cards
Tax exemption if applicable for rooms, etc.
Credit cards
GPAS/Merit Pay
Word processing area set up
Order forms and regulations
Letterhead
PCS on Military
Copier/Graphics Equipment
Typist/Clearances/Word Processor Training
TDY and Per Diem Out of Town (Rental Cars or GSA)
Purchase/Rental and moving of equipment
SSAC Meetings

Appendix F

Job Performance Planning Worksheets

The worksheets in this appendix are in the Apr 81, DA Form 4968, format. The current DA Form 5397-R, May 86, differs in format.

JOB PERFORMANCE PLANNING WORKSHEET

1. POSITION TITLE, PAY PLAN, SERIES, GRADE, AND JOB DESCRIPTION NO.

Special Assistant for Administration and Support

2. NAME AND LOCATION OF EMPLOYING ACTIVITY

3. NAME (Last, First, MI) AND SSN

4. RATING PERIOD

FROM:

THRU:

MAJOR JOB
ELEMENTSCRITICAL
ELEMENT

SUPPORTING TASKS

PERFORMANCE STANDARDS

46 (1) Special
Projects T800-XX-800
Engine Source
Selection Evaluation
Board (SSEB)

Yes

(1) Organizational Mission Accomplish-
ment.(1a) Develop, submit and update
SSEB operating budget requirements to
the Project Manager's Office(1b) Organizes, directs, coordi-
nates and accounts for usage of data.
Identify and analyze deficiencies,
recommend improvements and corrective
action that can be utilized in overall
mission accomplishments.(1c) Plan and organize all
requirements in the authorization of
efficient space, equipment, phones,
supplies and all administrative
support.(1a) Requirements are traceable to
manpower, TDY, and equipment estimates.
Timely, complete, accurate and fully
justified.(1b) Recommendations are well researched
and sound, while striving to meet organi-
zational goals.(1c1) Efficient space, equipment, phones
and supplies are available continuously.
Administrative support provided in a
timely manner.

(1c2) Initiate all corrective action.

Yes (2) Personnel Management

(2a) Provide an environment in which people are motivated, utilized, and developed each to his or her maximum capability, so that the organization maintains high employee competence, productivity, and morale.

(2a1) Organizational effectiveness evidenced through contribution to achievement of command objectives.

(2a2) Assure communications and coordination are stressed as a key responsibility to all personnel.

(2a3) Employee ratings and awards are equitably distributed.

(2b) Develop comprehensive and meaningful performance standards for all subordinates. Communicate with employees their performance against the standards.

(2b) Performance standards are measurable, understandable, challenging, attainable, and applied consistently. Completes all performance appraisals in a timely manner.

Yes (3) Resource Management.

(3a) Practices and implements DA and Command security regulations.

(3a) Practices and implements security regulations set forth by DA Command.

(3b) Assists in organizational review for adequacy to accomplish the mission.

(3b) Assists in organizational review for adequacy to accomplish the mission.

(3c) Assists in efficient and prudent use of travel and overtime funds.

(3c) Operates within prescribed allocations in efficient and prudent use of travel and overtime funds.

(3d) Prepare and maintain SSEB operating procedures and internal procedures.

(3d) Board Operating Procedures revised and changes made as necessary.

(3e) Directs the processing of all SSEB mail.

(3e) All mail processed/dispatched daily.

(3f) Manage, maintain, and account for SSEB property.

(3f1) Maintain accurate property book of all SSEB accountable equipment.

No (4) Professional Competence.

(4a) Technical knowledge.

(4b) Plans and carries out assignments.

(4c) Researches, organizes and presents written information.

(4d) Presents and listens to oral communications.

(4e) Considers and develops new approaches and solutions.

(4f) Demonstrates teamwork cooperation and supports management objectives and decisions.

(4g) Relates broad policy to detailed operations.

(4h) Plan, programs, and directs activity of the organization.

(4i) Maintains stability.

(4j) Performs other duties assigned.

(3f2) Arrange for repair of SSEB equipment within ten minutes of notification of failure.

(4a) Sound decisions, solutions, and recommendations.

(4b) Meets milestones and achieves goals. Timely, accurately and complete.

(4c) Clear, proper format, complete, accurate, fully staffed, less than 10% rejections.

(4d) Clear, convincing, considers all viewpoints.

(4e) Independently demonstrates initiative.

(4f) Works harmoniously with others, considering other viewpoints and always willing to give assistance.

(4g) Sound and supportable recommendations and decisions.

(4h) Effectively manages operations.

(4i) Maintains composure and effectiveness under pressure, adverse and changing conditions.

(4j) Shows willingness to assume extra responsibility and handles additional assignments in prompt and efficient manner.

JOB PERFORMANCE PLANNING WORKSHEET

1. POSITION TITLE, PAY PLAN, SERIES, GRADE, AND JOB DESCRIPTION NO.

Security/Visual Information Officer

2. NAME AND LOCATION OF EMPLOYING ACTIVITY

3. NAME (Last, First, MI) AND SSN

4. RATING PERIOD

FROM:

THRU:

MAJOR JOB
ELEMENTSCRITICAL
ELEMENT

SUPPORTING TASKS

PERFORMANCE STANDARDS

(2) Special
Projects T800-XX-800
Engine Source
Selection Evaluation
Board (SSEB)

Yes

(2a) Security of Building and Personnel.

(2a) Assure that building is secured on a daily basis in compliance with local regulations and Board Operation Procedures including following Energy Conservation Program. Building security must be accomplished 100% of the time. Assures that 100% of the personnel assigned to the Source Selection Evaluation Board (SSEB) are aware of security requirements.

(2b) Securing, controlling and proper handling of proprietary data.

(2b1) Containers for classified/sensitive data will be checked and secured on a daily basis. Work area will be checked to assure no classified/sensitive material is left unattended or unsecured.

(2b2) Assist in the distribution, collection and recording of Contractors proprietary data received for evaluation.

(2b3) Collect and secure classified/proprietary data waste on a daily basis, assist in shredding waste.

(2c) Facilities Coordinator.

(2c1) Serve and control of heating and air conditioning system, requesting maintenance and assistance as necessary. No more than six reports of failure to stay within established guidelines is acceptable.

(2c2) Establish emergency evacuation plan, assure personnel is knowledgeable of plan and emergency phone numbers. Ensure trash does not accumulate to cause fire hazard. No more than four write-ups allowed.

(2d) Mail/Correspondence distribution.

(2d) Delivery and receipt of priority documents. Distributing and routing correspondence. 95% accuracy.

(2e) Visual Information Officer.

(2e) Prepares visual aid such as view-graphs, charts, illustrations and diagrams for high-level briefings, reports or publications. Work must be accurate, neat and in appropriate format and style. Finished product must be of the highest quality and completed in a timely manner. All deadlines must be met and not more than one out of 25 returned for correction.

JOB PERFORMANCE PLANNING WORKSHEET

1. POSITION TITLE, PAY PLAN, SERIES, GRADE, AND JOB DESCRIPTION NO.

Administrative Assistant

2. NAME AND LOCATION OF EMPLOYING ACTIVITY

3. NAME (Last, First, MI) AND SSN

4. RATING PERIOD

FROM:

THRU:

MAJOR JOB
ELEMENTS

CRITICAL
ELEMENT

SUPPORTING TASKS

PERFORMANCE STANDARDS

(3) Special
Projects T800-XX-800
Engine Source
Selection Evaluation
Board (SSEB)

Yes

(3a) Prepare and maintain organization
chart for the SSEB.

(3a) Organization chart is kept current
and changes made in a timely manner. No
more than three times returned for errors
or omissions.

(3b) Receives request for expendable
supplies, consolidates requests,
researches for proper nomenclature,
correct price, etc., and prepares
requisition. Follows up on out of
stock items and maintains current
status of items due in. Maintains
records reflecting actual amount spent
on requisitions. Determines which
items are in general use throughout
SSEB and maintains adequate stock.

(3b) Request are prepared in accordance
with governing regulation so no more than
one out of five are returned or rejected.
Always assures funds are available
before submitting request. Ninety-five
percent accuracy is required on following
up on out of stock items. No more than
three instances of not having adequate
stock of general use supplies.

(3c) Requests and distributes publica-
tions and printed forms. Consolidates
request for printed forms, prepares
requisitions and makes distribution of
forms when received. Maintains ade-
quate stock of requested printed
forms.

(3c) Requests are prepared in accordance
with governing regulations so no more than
than three instances of not having
adequate stock of general use forms.

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(3d) Reviews for accuracy time and attendance reporting forms. Prepares Request and Authorization for Overtime Forms. Reports time to Home Command for out-of-town personnel.

(3d) Ensures time and attendance sheets, Time Cards and Labor Exception Records Forms are in agreement so no more than three per pay period are returned for errors or omissions. Annotates actual overtime on Request for Authorization for Overtime forms ensuring all figures are accurate. Reviews Labor and Production Reports so no more than three are returned per month. Submit all time and attendance forms by established suspense date. Always calls in accurate time for out-of-town personnel on specified day.

JOB PERFORMANCE PLANNING WORKSHEET

1. POSITION TITLE, PAY PLAN, SERIES, GRADE, AND JOB DESCRIPTION NO.

Administrative Secretary

2. NAME AND LOCATION OF EMPLOYING ACTIVITY

3. NAME (Last, First, MI) AND SSN

4. RATING PERIOD

FROM:

THRU:

MAJOR JOB
ELEMENTS

CRITICAL
ELEMENT

SUPPORTING TASKS

PERFORMANCE STANDARDS

(3) Special
Projects T800-XX-800
Engine Source
Selection Evaluation
Board (SSEB)

Yes

(3a) Receptionist for SSEB. Receive
telephone calls and visitors.

(3a) Assures proper forms are completed
and proper badge issued prior to entrance
to SSEB Areas. At all time assures that
non-SSEB personnel are escorted and do not
gain access to SSEB material. Uses proper
telephone procedures and provides informa-
tion and assistance as needed. Is
courteous and tactful at all times. 98%
accuracy is required. No more than three
justified complaints received.

(3b) Types a variety of material.

(3b) Material is typed accurately,
neatly, and in prescribed format. Proof-
reads all typing. Finished material is
properly arranged with correct number of
copies. Completes work within specified
time frame. No more than three out of
ten pieces are returned for correction of
errors, omissions or because of
appearances.

(3c) Establish and maintains adminis-
trative and reference files.

(3c) Assures files are established in
accordance with governing regulations so
not more than three out of ten pieces are

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(3d) Maintains and reports time and attendance and completes related reports.

misfiled. Assures all filing is accomplished within two work days following receipt.

(3d) Assures employee Time and Attendance Sheets are completed daily to enable proper posting of Time Cards and Labor Production Reports. Assures employee's Time Cards are posted daily and data recorded reflects accuracy so that no more than ten justifiable incidents of posting failures/data errors are recorded within the rating period.

(3e) Provides travel administration to include preparation of travel orders, vouchers, makes airline and motel reservations and prepares travel itinerary.

(3e) Completes all travel administration. Paperwork submission will not be returned for corrections more than two in ten submissions. All reservations must be arranged accurately. No allowable margin for error.

(3f) Compiles statistical data for various reports or charts.

(3f) Prepares reports or charts from data readily available from supervisor or office files. Verifies accuracy with not more than two out of ten reports prepared incorrectly.

(3g) Assist in mail/correspondence distribution.

(3g) Assist in timely distribution of mail to proper area so not more than two in ten items are mis-routed. Assure area correspondence is properly coordinated and routed so that not more than two in ten delay in processing.

(3h) Assist in destruction of waste.

(3h) Assist in shredding of proprietary and related data so that there is no undo accumulation of waste. 95% accuracy is required.

(3i) Operates reproduction machine at scheduled time.

(3i) Promptly reports to reproduction machine. Assures no unauthorized documents are reproduced. Reproduction is complete in accordance with instructions and within specified time frame. No more than three justified complaints received.

(3j) Works overtime as necessary to complete work load.

(3j) No more than twice will employee refuse to work overtime when there is heavy work load or back log of typing.

JOB PERFORMANCE PLANNING WORKSHEET

1. POSITION TITLE, PAY PLAN, SERIES, GRADE, AND JOB DESCRIPTION NO.

Lead Operator

2. NAME AND LOCATION OF EMPLOYING ACTIVITY

3. NAME (Last, First, MI) AND SSN

4. RATING PERIOD

FROM:

THRU:

MAJOR JOB
ELEMENTS

CRITICAL
ELEMENT

SUPPORTING TASKS

PERFORMANCE STANDARDS

(4) Special
Projects T800-XX-800
Engine Source
Selection Evaluation
Board (SSEB)

Yes

(4a) Organizes workload, proofreads and
verifies Final Report.

(4a1) Organizes documents by priority in
order to accomplish workload within
specified time frame. No more than three
realistic suspenses are missed.

(4a2) Proofreads incoming documents for
proper format, acronyms, and all changes
readable. Proofreads outgoing documents
to ensure all changes were made
correctly. Verifies Final Report against
Evaluation Plan to ensure all write-ups
are complete and no duplication of write-
ups. 95% required.

(4b) Provides instructions and assist-
ance.

(4b) Provides instructions on complex
assignments. Answers operators'
questions concerning machine functions.
Solves machine problems as they arise.
No more than two justified operator
complaints.

(4c) Serves as intermediary between
author and operators.

(4c) Uses tact, judgement and courtesy at
all times when answering questions con-

(4d) Performs surveillance over Word Processing System.

(4e) Keys new jobs.

(4f) Works overtime as necessary to complete work load.

cerning turn-around time, workload, submitting jobs, and priorities. No more than three justified and proven complaints.

(4d) Validates library space to ensure adequate space available. Deleting obsolete jobs and archiving inactive jobs must be performed in a timely manner. Never allow system to shut down due to availability of library space.

(4d2) Submits consolidated production reports by COB Mondays. No more than twice allow production logging to stop due to neglect.

(4e) Keys new jobs when workload demands and only when all other operators are busy.

(4f) No more than twice will employee refuse to work overtime when there is a heavy work load or back log of typing.

JOB PERFORMANCE PLANNING WORKSHEET

1. POSITION TITLE, PAY PLAN, SERIES, GRADE, AND JOB DESCRIPTION NO.

Typing Pool Member

2. NAME AND LOCATION OF EMPLOYING ACTIVITY

3. NAME (Last, First, MI) AND SSN

4. RATING PERIOD

FROM:

THRU:

MAJOR JOB
ELEMENTS

CRITICAL
ELEMENT

SUPPORTING TASKS

PERFORMANCE STANDARDS

(5) Special
Projects T800-XX-800
Engine Source
Selection Evaluation
Board (SSEB)

Yes

(5a) Word Processing Support - types a
variety of correspondence, reports and
statistical material from long hand and
copy type using IBM 5520 Administrative
System.

(5a(1)) Work prepared is accurate, neat,
complete and in accordance with SSEB
procedures so that no more than one out of
ten documents is returned for omission,
improper format, or appearance.

(5a(2)) No more than three justified com-
plaints because of employees failure to
take necessary action.

(5a(3)) Documents created are named so as
all operators can locate with little diffi-
culty. No more than three out of ten
documents cannot be located due to opera-
tor error in creating.

(5b) Works overtime as necessary to
complete work load.

(5b) No more than twice will employee
refuse to work overtime when there is
heavy work load or back log of typing.

(5c) Assist in destruction of waste.

(5c) Assist in the shredding of proprie-
tary and related data so that there is no

Typing Pool Member

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undo accumulation of waste. 95% accuracy is required.

(5d) Operates reproduction machine at scheduled time.

(5d) Promptly reports to reproduction machine. Assures no unauthorized documents are reproduced. Reproduction is complete in accordance with instructions and within specified time frame. No more than three justified complaints received.

JOB PERFORMANCE PLANNING WORKSHEET

1. POSITION TITLE, PAY PLAN, SERIES, GRADE, AND JOB DESCRIPTION NO.

Cost Area Secretary

2. NAME AND LOCATION OF EMPLOYING ACTIVITY

3. NAME (Last, First, MI) AND SSN

4. RATING PERIOD

FROM:

THRU:

MAJOR JOB
ELEMENTSCRITICAL
ELEMENT

SUPPORTING TASKS

PERFORMANCE STANDARDS

(3) Special
Projects T800-XX-800
Engine Source
Selection Evaluation
Board (SSEB)

Yes

(3a) Word Processing Support - types a
variety of correspondence, reports and
statistical material from long hand and
copy type using IBM 5520 Administrative
System.

(3a) Material is typed accurately,
neatly, in prescribed format and in
accordance with SSEB procedures. Proof-
reads all typing. Finished material is
properly arranged with correct number of
copies. Completes work within specified
time frame. No more than three out of
ten pieces are returned for correction of
errors, omissions or because of appear-
ance.

(3b) Establish and maintains administra-
tive and reference files.

(3b) Assures files are established in
accordance with governing regulations so
not more than three out of ten pieces
are misfiled. Assures all filing is
accomplished within two work days fol-
lowing receipt.

(3c) Maintains and reports time and
attendance and completes related
reports.

(3c) Assures employee Time and
Attendance Sheets are completed daily to
enable proper posting of Time Cards and
Labor Production Reports. Assures

(3d) Provides travel administration to include preparation of travel orders, vouchers, makes airline and motel reservations and prepares travel itinerary.

(3e) Assign the Area portion of the Board Control Number, controls, distributes, and files Error, Omission or Clarification (EOC) Report packages. Establishes and maintains Cost Area master file and tracks all EOC report packages.

(3f) Assist in mail/correspondence distribution.

(3g) Works overtime as necessary to complete work load.

employee's Time Cards are posted daily and data recorded reflects accuracy so that no more than ten justifiable incidents of posting failures/data errors are recorded within the rating period.

(3d) Completes all travel administration. Paperwork submission will not be returned for corrections more than two in ten submissions. All reservations must be arranged accurately. No allowable margin for error.

(3e) Knows current status of all EOC report packages. File is kept up-to-date. Area Control Number is assigned and distribution is made daily. 98% accuracy is required.

(3f) Assist in timely distribution of mail to proper individuals so not more than two in ten items are mis-routed. Assure area correspondence is properly coordinated and routed so that not more than two in ten delay in processing.

(3g) No more than twice will employee refuse to work overtime when there is heavy workload or backlog of typing.

JOB PERFORMANCE PLANNING WORKSHEET

1. POSITION TITLE, PAY PLAN, SERIES, GRADE, AND JOB DESCRIPTION NO.

Deputy Element Chief RAM/ILS Area

2. NAME AND LOCATION OF EMPLOYING ACTIVITY

3. NAME (Last, First, MI) AND SSN

4. RATING PERIOD

FROM:

THRU:

MAJOR JOB
ELEMENTSCRITICAL
ELEMENT

SUPPORTING TASKS

PERFORMANCE STANDARDS

Special Project
T800 Engine Source
Selection Evaluation
Board (SSEB)

Yes

Perform the full range of supervisory duties as RAM Deputy Element Chief and as Factor Chief for both Reliability and Maintainability Factors on the T800-XX-800 Engine Source Selection Evaluation Board (SSEB). Assist in the evaluation process for the SSEB. Assist in supporting the SSEB through the preparation, analysis and documentation of the RAM Element T800 Engine critical selection process.

(1) Ensure that the evaluation plan is adhered to and scoring criteria are consistently and accurately applied and that the evaluations of issues arising from new, innovative proposal approaches are applied fairly.

(2) Evaluations are well supported, documented, and in agreement with concepts directed by AMC and DA.

(3) Assess potential impacts and concerns in other areas - Production Competition, Technical Cost and ILS to support overall SSEB efforts.

(4) Exhibit a complete and thorough understanding of RAM systems and provides authoritative view of each offeror's proposed RAM plans.

(5) Ensures that assigned evaluators are properly accurately, and clearly instructed on their duties and that the

subordinate's responsibilities are well understood.

(6) Ensures rapid and accurate turn-around of Best and Final Offer (BAFO) evaluations and that deadlines are met.

(7) Prepare documentation and assist in preparing meetings and briefings relative to the RAM Element in support of the SSEB.

JOB PERFORMANCE PLANNING WORKSHEET

1. POSITION TITLE, PAY PLAN, SERIES, GRADE, AND JOB DESCRIPTION NO.

Factor Chief, RAM/ILS Area

2. NAME AND LOCATION OF EMPLOYING ACTIVITY

3. NAME (Last, First, MI) AND SSN

4. RATING PERIOD

FROM:

THRU:

MAJOR JOB
ELEMENTSCRITICAL
ELEMENT

SUPPORTING TASKS

PERFORMANCE STANDARDS

Special Project
T800 Engine Source
Selection Evaluation
Board (SSEB)

Yes

Perform duties commensurate with the responsibilities of a Factor Chief on T800 Engine SSEB. Provide analytical, administrative and documentary support of the RAM Element source selection process of the SSEB.

(1) Ensure a consistent and accurate proposal evaluation process with related documentation.

(2) Provide rapid and accurate turnaround of all relative Factor evaluations and analyses, meetings established deadlines.

(3) Support T800 Engine SSEB briefings and practices within AMC and DA guidelines.

JOB PERFORMANCE PLANNING WORKSHEET

1. POSITION TITLE, PAY PLAN, SERIES, GRADE, AND JOB DESCRIPTION NO.

Evaluator RAM/ILS Area

2. NAME AND LOCATION OF EMPLOYING ACTIVITY

3. NAME (Last, First, MI) AND SSN

4. RATING PERIOD

FROM:

THRU:

MAJOR JOB
ELEMENTS

CRITICAL
ELEMENT

SUPPORTING TASKS

PERFORMANCE STANDARDS

Special Project
T800 Engine Source
Selection Evaluation
Board (SSEB)

Yes

Perform as a member of the T800 Engine
SSEB.

(1) Performs necessary evaluations and
analyses and provides supportive rationale
and documentation in agreement with con-
cepts directed by AMC and DA.

(2) Support SSEB process to assure
development acquisition policies.

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Appendix G

Air Force Lessons Learned Data Bank

DEPARTMENT OF THE AIR FORCE

Headquarters Air Force Acquisition Logistics Center

Wright-Patterson Air Force Base, Ohio 45433-5000

REPLY TO

ATTN OF: LSL

23 Jan 1987

SUBJECT: Air Force Lessons Learned Data Bank On-Line Access Service

TO: Government Agencies/DOD Contractors

1. A direct on-line access system for the Air Force Lessons Learned Data Bank is currently undergoing testing. This service; which should be fully operational approximately 1 Mar 87; will allow users with a remote terminal and modem, the capability to directly access the data bank and perform several search, retrieval, and downloading functions.

2. The same access restrictions will apply to this feature as have recently been implemented to normal hardcopy lesson requesting. That is, the requestor for a system "Username" must be a DOD employee or a contractor registered with the Defense Logistics Services Center (DLSC) as a qualified US contractor IAW DODD 5230.25. The request for a direct-access username by all contractor personnel must be accompanied by a copy of a completed DD Form 2345 that has been certified by DLSC-FBA and includes the certification number. After the requests have been received the 2345 will be checked against the Qualified Contractors Access List (QCAL), usernames will be issued, and further log-in information provided.

3. Any questions concerning this service should be addressed to the Lessons Learned Data Bank staff AFALC/LSL, Wright-Patterson AFB, OH 45433-5000, AUTOVON 785-3161 or commercial (513) 255-3161.

/s/GERALD HARRISON
Director of Systems Support
Deputy for Integrated Logistics

LESSON LEARNED PUBLICATIONS

The Air Force Acquisition Logistics Center maintains a corporate memory of lessons learned which, when applied, provides feedback for improving acquisition programs. If they are to be applied, they must be communicated to the decision makers in current programs.

This newsletter lists the lessons learned products that are available from our data bank. Customers may request products on an as-needed basis, ensuring delivery of the most current edition.

Basically we employ the following methods to communicate lessons learned: 1) Lessons Learned Abstract: This is an interest-generating publication to acquaint people with our services and to provide a brief summary of all the lessons contained in our data bank. 2) Individual Lessons Learned: Lessons ordered by number from the abstract or by requesting a keyword search. 3) Bulletins: These are a grouping of lessons covering a specific topic. We presently have bulletins covering the following subjects:

Accessibility	Source Selection
Automatic Test Equipment	Supply Support
Commercial off-the-shelf	Support Equipment
Competition Advocacy	Survivability
Composites	Technical Orders
Computer Resources	Test and Evaluation
Contract Administration	Training and Training Support
Contract Design Considerations	
Corrosion	
Energy Management	
Engineering Data	
Engines	
Facilities	
Fault Isolation and Failure Verification	
Logistics Support Analysis	
Logistics Support Management Information	
Logistics Support Resource Funds	
Maintenance Planning (Concept)	
Manpower Requirements and Personnel	
Missiles	
Packaging, Handling, Storage and Transportation	
Pricing and Cost Analysis	
Program Management Responsibility Transfer	
Quality Assurance	
Reliability and Maintainability	
Safety	
Solicitation and Contract Preparation Planning	
Solicitation and Contract Preparation, The Schedule	
Solicitation and Contract Preparation, The Schedule Section C	
Solicitation and Contract Preparation, The Schedule Section C Work Statements	
Solicitation and Contract Preparation, Sections J, L, and M	

If you have any questions concerning the Lessons Learned Program or wish to order any of the above products, please phone AUTOVON 785-3161, commercial (513 255-3161 or write AFALC/LSL, Wright-Patterson AFB, Ohio 45433-5000.

CALL NUMBER:
0450

TOPIC:

INSTRUCTIONS TO OFFERORS (ITOs)/EVALUATION FACTORS FOR AWARD (CRITERIA)/
EVALUATION STANDARDS/REQUEST FOR PROPOSALS (RFP)

LESSON LEARNED:

Evaluation criteria, evaluation standards, and instructions to offerors associated with an RFP should be written at the same time and by the same people to ensure mutual compatibility.

PROBLEM:

Problems have resulted from inconsistencies among the proposal requirements, evaluation criteria, and the statement of work (SOW), including life cycle cost (LCC) models. When evaluation standards are written subsequently to the ITOs for the RFP, the following problems can arise:

- (1) The evaluation standard may not correspond with the ITOs.
- (2) An evaluation standard may be difficult to write for the material a bidder is requested to address.

(3) The evaluation standard may not correspond with the statement of work. Problems have resulted from inconsistencies between proposal technical requirements, instructions to offeror (ITO), evaluation criteria (factors), and evaluation standards (minimum acceptable proposal response levels) when they are not written by the same team of people at the same time. The following problems have arisen:

1. Offerors have refused to respond to source selection questions that are based upon the evaluation criteria when the ITO (section L of the RFP) did not cover the specific area in question.
2. ITOs have been structured in such a manner that the evaluation standards (section M of the RFP) were virtually impossible to develop.
3. The evaluation criteria/standards were not compatible with the RFP.

DISCUSSION:

When developing a request for proposals (RFP), the individuals preparing the ITOs should be tasked to develop the RFP evaluation standard simultaneously. Preparation of the evaluation standard surfaces deficiencies in the ITOs, and possibly the statement of work (SOW), which would not produce the desired information from the offerors. It also ensures the two are compatible when completed. When developing a RFP, the individual(s) preparing the ITO should be tasked to develop both the evaluation criteria and evaluation standards at the same time. Preparation of the criteria/standards could surface deficiencies and/or incompatibilities within and between the ITO and the RFP. These problems could result in failure to produce the desired information from the offerors.

APPROPRIATE ACTION:

When building request for proposals, develop the evaluation standards simultaneously with the information to offerors and make sure the evaluation criteria corresponds with the statement of work and information requested from

the offerors. A review should be made to assure there is a "track" from SOW through the evaluation criteria and the proposal information as reflected in the ITOs. Specific guidance is contained in AFR 70-15. The Source Selection Advisory Council and Source Selection Evaluation Board must ensure that:

1. Adequate planning is done to assure a timely selection of the most realistic proposal.
2. The evaluation standards are developed simultaneously with the "Instructions to Offerors" and "Evaluation Factors for Award" (criteria). Also, the evaluation criteria contained in the source selection plan and the request for proposals (RFP) must be in agreement in both documents.
3. The RFP is checked to determine that the data required for evaluation has been included and distinctly identified as required for source selection and that appropriate information has been requested of the offerors.
4. The evaluation standards are written in sufficient detail (quantitative or qualitative depending upon the factor or subfactor it addresses) to measure how well each offeror's approach meets the requirements.
5. Specific guidance is provided to Source Selection personnel in writing "Evaluation Standards" in AFR 70-15.

Appendix H

Air Force Systems Command, Electronic Systems Division Sample Evaluation Standards

The following information must be read in the context of how the Army and Air Force divides the total evaluation by a work breakdown structure as follows:

<u>ARMY</u>	<u>AIR FORCE</u>
Area	Area
Element	Item
Factor	Factor
Subfactor	

Standards

AREA: Technical

OFFEROR CODE

ITEM: T.1 System Reliability

FACTOR RATING

FACTOR	RFP REFS	RATING	FACTOR AND STANDARDS
T.1.1	SOW _____ IFPP _____ _____ _____ _____ RFP Section M _____ _____		<p><u>Factor:</u> System Reliability</p> <p><u>Description:</u> The offeror should provide acceptable analyses, experience factors and test data which show the system mean time between failure (MTBF) to be at least _____ hours and which meets the reliability parameters claimed by the offeror.</p> <p><u>Standards:</u> The standard is met when the offeror:</p> <ol style="list-style-type: none">(1) Provides well supported evidence in the form of analyses, operational or field experience or test data which shows the system MTBF meets or exceeds the minimum specified in the _____.

Factors and Standards

AREA: Technical

OFFEROR CODE

ITEM: T.2 Performance Requirements

FACTOR RATING

FACTOR	RFP REFS	RATING	FACTOR AND STANDARDS
T.2.2	SOW _____ IFPP _____ _____ _____ _____ _____ RFP Section M _____		<p><u>Factor:</u> Specific Performance and Physical</p> <p><u>Description:</u> The offeror should provide detailed descriptions, supply supporting data and provide certified test data which prove all performance and physical parameters are met by the proposed system.</p> <p><u>Standards:</u> The standards are met when the offeror:</p> <ol style="list-style-type: none"> (1) Provides technical explanations, circuit diagrams, technical performance data, certified test data, details concerning installation procedures and requirements, information on physical parameters, and other data which completely address all performance and physical requirements and show how the proposed system meets the requirements.
T.2.3	IFPP _____ _____ RFP Section M _____		<p><u>Factor:</u> Site Preparation</p> <p><u>Description:</u> The offeror should detail the required work to survey the site, prepare the site and to install support services to get the site ready for installation of the system. Prior experience will be of value in this description.</p> <p><u>Standard:</u> The standard is met when:</p> <ol style="list-style-type: none"> (a) The installation skills required are within the capabilities of existing AFCC resources.

- (b) The installed system is not hazardous for maneuvering or protected aircraft, or otherwise detrimental to secure and efficient installation.

Factors and Standards Description

AREA: Technical

OFFEROR CODE

ITEM: T.3 Manufacturing

FACTOR RATING

FACTOR RFP REFS RATING

FACTOR AND STANDARDS

T.3.1

Factor: Manufacturing Capability

IFPP _____
SOW _____
RFP Section M

Description: The offeror should provide a comprehensive description of the following subjects: manufacturing capabilities, particularly the capacity to produce at least _____ systems per month plus spares; plant to support production and testing efforts required; production organization, production control, production engineering; process planning, subcontract management and make or buy proposals; quality assurance plan.

Standards: The standard is met when the offeror has:

- (1) Sufficient plant capacity to manufacture _____ units/month and spares.
- (2) Production organization, production control, production engineering and process planning sufficient for quality manufacturing at the required system rate.
- (3) Production/manufacturing staff and technically skilled personnel needed to produce the required systems.
- (4) A quality assurance plan which will maintain workmanship and product reliability at the required production rate.

Factors and Standards Description

AREA: Technical

OFFEROR CODE

ITEM: T.4 Logistics Support

FACTOR RATING

FACTOR RFP REFS RATING

T.4.1 IFPP _____

SOW
RFP Section M

FACTOR AND STANDARDS

Factor: Proprietary Data and Engineering Data

Description: The offeror will address data rights and Level 3 Engineering Drawings.

Standards: The standard is met when the offeror:

- (1) Is willing to sell the government unlimited data rights or identifies proprietary data restrictions which inhibit the development of an organic maintenance capability.
- (2) Shows an understanding of DOD-STD-100C engineering data requirements for Level 3 drawings, identifying the differences between limited rights and design disclosure packages. Specifically that a design disclosure package includes:
 - a. All detailed assembly and installation drawings, schematics, wiring diagrams, parts list, data list, assembly steps and processes and part acceptance.
 - b. Any other data required to produce the end item including acceptance test procedures.
- (3) Identifies his means to produce a Level 3 reprocurment drawing package.

T.4.2 IFPP _____
SOW _____
RFP Section M _____

Factor: Preoperational Support

Description: The offeror shall address and describe his method for providing preoperational support conforming to SOW _____

Standards: The standard is met when the offeror:

- (1) Describes adequate procedures for providing preoperational support consistent with SOW _____

T.4.3 IFPP _____
SOW _____
RFP Section M _____

Factor: Post Production Support

Description: The offeror shall describe his method of notifying customers of a production phaseout. The offeror shall present contingency plans for providing parts/support services for _____ years following delivery of the purchased equipment if a production phase out occurs.

Standards: The standard is met when the offeror:

- (1) Describes his methods/procedures of notification/support if a production phaseout occurs. Provides assurance that parts support and service will be available at least _____ years after delivery.

Factors and Standards Description

AREA: Technical

OFFEROR CODE

ITEM: T.5 Program Management

FACTOR RATING

FACTOR RFP REFS RATING

FACTOR AND STANDARDS

T.5.1 IFPP _____
 SOW _____
 RFP Section M _____

Factor: Organization

Description: The offeror describes the structure or organization of his work force to accomplish the work. The offeror must provide information showing that basic management resources exist sufficient to handle this procurement.

Standards: The standard is met when the offeror:

- (1) Places a program manager with overall responsibility.
- (2) Describes an organization with experienced people, listing their qualifications, and management support facilities and function and their availability.

Appendix I

Air Force Systems Command, Electronic Systems Division, Evaluation Standards Development Guidance

AFR 70-15/ESD Sup 1

Supplemental Guidance to Attachment 3 of AFR 70-15

Standards are internal documents and are not provided to the offerors. They must be developed by the SSEB/SSET and approved by the SSAC (or SSET Rankers) before RFP release. Standards are "measurement guides" used by the evaluators to determine how well an offeror's proposal meets or fails to meet minimum Government requirements.

The following checklist should be used when developing Standards.

1. Keep standards to a minimum. They should be tailored to those characteristics of your particular program as identified in Section M (Evaluation Factors for Award) and Section L (Instructions for Proposal Preparation) and which have an impact on the ultimate selection decision.
2. Ensure that there is a clear track from the RFP requirements (Statement of Work, Specification, CDRL, Contract, etc.) to Section M of the RFP to Section L of the RFP to the Standards.
3. Organize your Standards so that they correspond with the order of importance identified for areas and items in Section M of the RFP.
4. Use a common format and numbering system for all standards. References to Section M, IFPP, Specification, etc. must be used (see figure 1).
5. Before printing, the SSEB/SSET Chairperson must ensure that all standards: are absolutely necessary and are traceable back to the RFP requirements (per 2 above); do not overlap or duplicate between areas (cannot rate offeror more than once for the same thing); are properly and consistently formatted; and are grammatically correct. Remember it's the SSAC's job to approve the standards, not to edit/proofread them.

AREA: T. Technical

ITEM: T.1 *Design for Reliability and Maintainability

FACTOR #: T.1.1. **System Reliability

SEC M REF	IFPP REF	SOW REF	SPEC REF	OTHER REF	STANDARD
5.1.1	5.1.1.1	TASK#	3.4.1.1.1	CDRL, Contract etc.	<p><u>DESCRIPTION:</u></p> <p>Evaluation will be made of the offeror's approach to meeting the specified reliability value of (hours) Mean-Time-Between-Failure (MTBF).</p> <p><u>STANDARD:</u></p> <p>The standard is met when the offeror's proposed MTBF values meets the specified values; is consistent with their design; is achievable, sound and supported by field experience, operational use or analysis which addresses (as a minimum):</p> <ul style="list-style-type: none"> o Derating of Parts o Environmental Stress Screening o Thermal Interfaces o Verification Procedures o Failure Recording

* Indicates that Design for Reliability and Maintainability is first (or most important) item under the Technical area.

** Indicates that System Reliability is the first evaluation factor traceable back to the Design for Reliability and Maintainability item of the RFP.

Appendix J

Air Force Systems Command, Electronic Systems Division, Evaluation Standards
Instructions for Application and Documentation

The following information must be read in the context of how the Army and Air Force divides the total evaluation by a work breakdown structure as follows:

<u>ARMY</u>	<u>AIR FORCE</u>
Area	Area
Element	Item
Factor	Factor
Subfactor	

FACTOR WORKSHEET		
AREA	ITEM	OFFEROR
FACTOR		COMMENTS
STANDARD	RATING + ✓ - 0	
		<p>0 PREPARED DURING INITIAL EVALUATION</p> <p>0 CHOOSE A RATING</p> <p>+ EXCEEDS STANDARD</p> <p>✓ MEETS STANDARD</p> <p>- marginally acceptable</p> <p>0 FAILS TO MEET STANDARD</p> <p>0 EXPLAIN BASIS OF RATING</p> <p>COMPLETE EXPLANATION</p> <p>DESCRIPTIVE ADJECTIVES</p> <p>UNDERLINE STRONG/WEAK POINTS</p> <p>REFERENCE PROPOSAL (VOL I, PARA 1.2.1)</p> <p>0 RECOMMEND PREPARATION OF CR(S)/DR(S) TO ITEM CHIEF</p> <p>CLARIFICATION REQUEST (CR) FOR - RATING</p> <p>DEFICIENCY REPORT (DR) FOR 0 RATING</p> <p>Information is explanatory in nature and non-sensitive.</p>
EVALUATOR'S SIGNATURE		

AFSC-Andrews AFB DC 1985

FACTOR SUMMARY		
AREA	ITEM	OVERALL RATING
FACTOR	OFFEROR	
DESCRIPTION OF PROPOSAL		
0 BRIEF PROPOSAL DESCRIPTION 0 COLLECTIVE AGREEMENT BY FACTOR MEMBERS 0 NO EVALUATION JUDGEMENTS		
STRONG POINTS		
0 GROUP CONSENSUS 0 DESIRABLE TO GOVERNMENT 0 NO SIGNIFICANT INCREASE TO RISK -- INNOVATIVE! -- SIMPLE DESIGN APPROACH! -- LOW-RISK! 0 USE DESCRIPTIVE ADJECTIVE -- EXCELLENT! -- EXCEPTIONAL! -- SUPERIOR! -- OUTSTANDING! 0 REFERENCE PROPOSAL		
Information is explanatory in nature and non-sensitive.		
FACTOR CHIEF SIGNATURE		ITEM CHIEF SIGNATURE

WEAK POINTS

OVERALL RISK ASSESSMENT AND EVALUATION SUMMARY

ITEM SUMMARY			
AREA	ITEM	OFFEROR	COLOR RATING
<p>DESCRIPTION OF PROPOSAL</p> <ul style="list-style-type: none"> 0 INCORPORATE FROM FACTOR SUMMARIES (CR, DR, POINT FOR NEGOTIATION (PFN) RESULTS) 0 NO EVALUATION JUDGEMENTS 			
<p>STRONG POINTS</p> <ul style="list-style-type: none"> 0 PREPARED DURING INITIAL EVALUATION 0 DRAFT FINAL AFTER NEGOTIATIONS (CR, DR, PFN RESULTS) 0 FINAL COMPLETED AFTER RECEIPT OF BAFO 0 ITEM CHIEF SELECTS STRENGTHS FROM FACTOR SUMMARIES 0 SIGNIFICANT TO PROGRAM'S SUCCESS 0 DISCRIMINATOR FOR SELECTION 0 TRACEABLE <p>Information is explanatory in nature and non-sensitive.</p>			
ITEM CHIEF SIGNATURE		AREA CHIEF SIGNATURE	

FOR OFFICIAL USE ONLY
SOURCE SELECTION, SENSITIVE (When Filled In)

WEAK POINTS

OVERALL RISK ASSESSMENT AND EVALUATION SUMMARY

AREA SUMMARY		
AREA	OFFEROR	COLOR RATING
<p>DESCRIPTION OF PROPOSAL</p> <p>0 INCORPORATE FROM ITEM SUMMARIES</p> <p>0 NO EVALUATION JUDGEMENTS, PLEASE!</p>		
<p>STRONG AND WEAK POINTS ITEM BY ITEM (Continue on Reverse)</p> <p>0 PREPARED DURING INITIAL EVALUATION</p> <p>0 DRAFT FINAL AFTER NEGOTIATIONS</p> <p>0 FINAL COMPLETED AFTER RECEIPT OF BAFO</p> <p>0 AREA CHIEF SELECTS FROM ITEM SUMMARIES</p> <p>0 SEPARATES STRONG AND WEAK POINTS</p> <p>0 LISTS IN ORDER OF IMPORTANCE BY ITEM</p> <p>0 KEY TO THE PROGRAM'S SUCCESS</p> <p>0 SIGNIFICANT DISCRIMINATOR</p> <p>0 TRACEABLE</p> <p>Information is explanatory in nature and non-sensitive.</p>		
AREA CHIEF SIGNATURE		SSEB CHAIRPERSON SIGNATURE

STRONG AND WEAK POINTS ITEM BY ITEM

- 0 IDENTIFY APPLICABLE CR/DR NUMBER OF WEAK POINTS
AFTER EACH WEAK POINT (DR-T1-A-001)
- 0 IDENTIFY APPLICABLE PFN NUMBER FOR STRONG POINTS FOR CONTRACTUAL
ACTION

OVERALL RISK ASSESSMENT AND EVALUATION SUMMARY

- 0 ASSIGN RISK
- 0 ASSIGN COLOR RATING BASED ON ITEM RATINGS
- 0 JUDGEMENT SUBSTANTIATED
- 0 COST IMPACT FOR WEAKNESS/RISK (QUANTIFY)

OFFEROR RESPONSE SUMMARY		
AREA	ITEM	OFFEROR
DEFICIENCY REPORT #	CLARIFICATION REQUEST #	POINT FOR NEGOTIATION #
OFFEROR REFERENCE		GOVERNMENT REFERENCE
EVALUATOR'S ASSESSMENT OF OFFEROR'S RESPONSE		
<p>0 PREPARED BY COGNIZANT ITEM CHIEF</p> <p>0 DOCUMENTS OFFERORS RESPONSE TO A CR, DR OR PFN</p> <p>0 SERVES AS THE DOCUMENTATION TRACK BETWEEN THE INTIAL AREA AND ITEM SUMMARIES AND THE FINAL AREA AND ITEM SUMMARIES</p> <p>Information is explanatory in nature and non-sensitive.</p>		
IMPACT ON PROPOSAL RATING		
<p>0 IDENTIFY IMPACT OF OFFERORS RESPONSE, I.E., CR/DR CLEARED, NO FURTHER ACTION NEW DR, PFN, ETC.</p>		
AREA CHIEF		SSEB CHAIRPERSON

COLOR RATING DESCRIPTOR

<u>COLORS</u>	<u>DESCRIPTORS</u>
BLUE	excellent exceptional extensive exceed outstanding superior
GREEN	adequate good average acceptable satisfactory sufficient
YELLOW	weak poor limited minimal marginal incomplete
RED	unacceptable bad failed deficient lacking inadequate

Appendix K

T800-XX-800 Engine, Source Selection Evaluation Board, Certificate of Non-Disclosure

CERTIFICATE OF NON-DISCLOSURE

I have read and understand the requirements of:

Army Regulation 340-17, Safeguarding For Official Use Only Information

Army Regulation 380-5, Department of the Army Information Security Program

I understand my obligation not to divulge information received in confidence from contractors in connection with bids and proposals, trade secrets, inventions, discoveries, and reports of financial, technical, and scientific nature.

I further understand my responsibility not to disclose the methods or procedures being used by the Board to evaluate offeror's proposals.

I will not reveal the standards, ratings, or scores used by this Board in the evaluation process unless authorized to do so by competent authority.

I will not discuss the proceedings of the SSEB outside of the evaluation site nor will I reveal the names of any members of the SSEB to ANYONE.

SIGNATURE

PERMANENT DUTY STATION

DATE

Appendix L

T800-XX-800 Engine Source Selection Evaluation Board, Rules of Conduct

RULES OF CONDUCT

Due to the competing offerors' intense interest in the deliberations of this T800 Engine Source Selection Evaluation Board, the inadvertent release of information could be a source of considerable misunderstanding and embarrassment to the Government. Therefore, it is mandatory for all Board members and advisors to observe the following rules:

1. Request your parent organization not to divulge your membership on the Evaluation Board to casual callers.
2. Divert all attempted communication by offeror representatives to the Contracting Officer.
3. Under no circumstances accept any invitation from offeror personnel for participation in any affair regardless of how remote it may be from the Source Selection action.
4. Do not assume a non-participating contractor can be told anything pertaining to this Source Selection.
5. Do not discuss any aspect of the Source Selection with other Board Members outside the area designated for deliberations.
6. Do not assume it is safe to speak of the Source Selection because you are among Government employees or are in the Government buildings or offices.
7. Do not discuss substantive issues of the Source Selection with any unauthorized individual even after the selection of a contractor(s).

SIGNATURE

PERMANENT DUTY STATION

DATE

Appendix M

Protection of Competition Sensitive Information (CSI), XYZ System Program

See Distribution

1. Reference the attached "Competition Sensitive Information Guide, XYZ System," effective _____ (Day Month Year).
2. This command is committed to the protection of information submitted by competing contractors that is designated as "Competition Sensitive." It is imperative that all elements involved with this program are aware of, and understand, the basic procedures for handling this type information. The CSI Guide is a short summary of the basis for protecting CS information during prototyping competition.
3. The CSI Guide follows regulatory instruction that requires protection of CS information (See FAR 15.413). That instruction will be made a contractual requirement during the competitive Full Scale Development phase once contract awards are made. Specific information and guidance concerning CS information relating to the XYZ System Program is outlined in this guide.
4. The Government is obligated to protect CS information for all XYZ System competitors. Accordingly, each Command element dedicated to this program is therefore reminded of that obligation.
5. Please contact the undersigned at "Telephone Number" if there are any questions or comments regarding this document.

1 Encl
as

Contracting Officer

DISTRIBUTION:

List of Commands and other applicable Govt elements

COMPETITION SENSITIVE INFORMATION GUIDE
FOR THE
XYZ SYSTEM

Effective Date: (Day Month Year)

Issued by: Project Manager, XYZ System

Program/Project Numbers:

GENERAL INSTRUCTIONS

1. PURPOSE: To provide instructions and guidance for the identification, marking and safeguarding of Competition Sensitive Information (CSI) and material pertaining to the XYZ System.

2. DEFINITION: Competition Sensitive Information is defined as the written information, visual aids and/or oral information of one Contractor (or his subcontractors) who is competing in a competitive engineering development program which, if disclosed to another contractor (or his subcontractors) who is also competing in the engineering development, would jeopardize and/or compromise one or both of the Contractor's competitive position(s).

3. APPLICABILITY: These instructions apply to all competitive prototype systems, subsystems, and support services requirements within the XYZ System program. This instruction will form the basis for handling documents, photographs, models, equipment, material, data and information pertaining to all competitive prototype efforts within the XYZ System program and its subordinate projects. This guide applies to all Government personnel.

4. IDENTIFICATION OF COMPETITION SENSITIVE INFORMATION: Normally competition sensitive markings will be based on information provided by the competing contractors. However, Government personnel will generate information which should be protected as "Competition Sensitive." Examples of such information are trip reports or meeting reports prepared by Government personnel pertaining to one of the contractor's or subcontractor's progress, plans, activities, problems, or hardware features. Additional examples are engineering, test and cost evaluations prepared by Government personnel which may be helpful to one competitor over the other if disclosed.

5. CONTROL OF COMPETITION SENSITIVE INFORMATION: Information identified as Competition Sensitive Information will be marked and controlled as follows:

a. Originators of documents will be responsible for identifying and marking such data determined to contain CSI by marking or stamping the phrase COMPETITION SENSITIVE in the bottom portion of each page or by marking each paragraph separately, e.g., 6. (CS). Paragraph markings will make precedence over page markings when utilized. The outside of the front cover (if any), the title page (if any), each page containing CSI and the first page will be stamped or marked COMPETITION SENSITIVE.

COMPETITION SENSITIVE INFORMATION GUIDE (Cont'd)

b. Documents marked CS will be stored in locked desks or locked file cabinets when unattended.

c. Information marked CS will be destroyed as "For Official Use Only" waste.

d. Upon completion of the competitive phase of each development, and after award of contract(s) to the successful competitor(s), data belonging to each unsuccessful competitor shall continue to be treated as competition sensitive, and shall continue to be handled accordingly. Data from the successful competitor(s) shall be treated in accordance with the terms of the contract.

e. Nothing contained herein limits any rights the Government has pursuant to any other legends (See FAR 15.413) or by separate agreement or classification markings.

f. Disclosure of CS information shall be limited to Government personnel who (1) have a need-to-know, and (2) have signed the attached Non-Disclosure Statement. The XYZ System PMO will be the office of record for Non-Disclosure Statements.

6. TRANSMITTAL OF COMPETITION SENSITIVE CORRESPONDENCE/INFORMATION:

a. Unclassified information marked CS may be transmitted in an opaque envelope or packaging by United States Postal Service certified or first class mail; or hand carried by courier. Individuals must insure that exposure to CS documents by others be on a strict need-to-know basis. Care must also be taken to preclude loss.

b. No document shall be reproduced without permission of the originator.

c. All correspondence shall be addressed to individuals, not organizations.

d. Correspondence shall advise the addressee that reproduction and further distribution is either controlled or prohibited, to be determined on a case-by-case basis.

e. Transmittal of CS information by means of electrical transmission should be avoided.

f. Recipients of documents that appear to contain sensitive source selection information, but are not so protected, shall take steps to protect it from unauthorized disclosure, and shall immediately advise the document source of their concerns.

7. PUBLIC RELEASE OF OFFICIAL INFORMATION:

a. Proposed public release of official information from Government sources pertaining to this program shall be forwarded through the Project Manager to the appropriate Information Officer for review and further processing.

COMPETITION SENSITIVE INFORMATION GUIDE (Cont'd)

b. Any requests by prospective contractors for release of official information shall be forwarded to the Contracting Officer for review and approval.

c. Only information which has been officially approved for public release by the Department of Defense may be released without further recourse. This pertains to advertisements previously released to the press or advertisements or products being utilized in the XYZ System Design.

d. Subcontractors will submit any material prepared by them for public release through their prime contractor.

8. RESPONSIBILITY: Each person having access to CS information is individually responsible for the information consistent with the requirements of this guide. Failure to do so will make the individual subject to appropriate administrative action.

9. PREVIOUSLY PUBLICLY RELEASED INFORMATION: Any information which the contractor has previously released publicly, through such events as briefings, press releases, or advertisements, shall not be considered CSI pursuant to this guide.

AMCPM-T800-SSEB

SUBJECT: Non-Disclosure Statement, XYZ System Development Program

Project Manager
XYZ System
ATTN: ABCCOM-BR
Official Address
of Project Manager

1. I understand my obligation not to divulge information received in confidence from contractors or Government sources in connection with proposals, statement of work, trade secrets, inventions, discoveries and reports of a financial, technical or scientific nature. I will not disclose any aspect of competition sensitive information with either Government or non-Government personnel not having a need to know. An individual with a need to know must have executed a non-disclosure statement the same or similar to this.

2. I further understand that due to the competing contractor's intense interest in the XYZ System Program, the unauthorized release or disclosure of information could be a source of considerable misunderstanding. I will conscientiously evaluate all information concerning the XYZ System Program which I have obtained through conversation or written material to protect its "Competition Sensitive" nature.

(Signature and Date)

(Printed or Typed Name)

(Office Address)

Appendix N

National Aeronautics and Space Administration, Marshall Space Flight Center
Letter on Procurement Sensitivity of the MARS Observer Flight Requirement

DA01

TO: All Employees

FROM: DA01/W. R. Lucas

SUBJECT: Procurement Sensitivity of the MARS Observer Flight System Requirement

In the near future, Jet Propulsion Laboratory (JPL) will release to industry the Request for Proposals (RFP) for the MARS Observer Flight System Requirement. The procurement will utilize Source Evaluation Board procedures, and MSFC employees have been appointed to this Board. Therefore, effective immediately all Center employees will cease communications with industry concerning this procurement. This "blackout" period of communication with industry will continue until proposals have been received, evaluated, the contract awarded, and the Source Evaluation Board released from its responsibilities.

Since this procurement represents a significant business opportunity for the private sector, it is expected that prospective contractors will be seeking the maximum information regarding the work to be performed as well as the structure of the competition itself. Accordingly, oral or written requests for information regarding this procurement shall be referred to Mr. Jim Curtis, JPL Procurement Office, telephone 818-354-8160, the designated formal point-of-contact for JPL. Requests for RFP information or clarification shall be handled in the same manner. Compliance with this policy will ensure the dissemination of uniform responses to all inquiries and eliminate the preferential treatment of any prospective proposer.

The administration of currently existing and/or incipient contracts with industry competing on the MARS Observer Flight System Requirement procurement shall be conducted by the responsible MSFC personnel who shall, at all times, be fully aware of the extremely sensitive nature of their contact with such firms. Under no circumstances shall the MARS Observer Flight System Requirement be discussed with those firms.

It is important that all MSFC personnel adhere to the above stated policy so that our goal of treating all prospective proposers equitably may be achieved.

/s/
W. R. Lucas
Director

Distribution:
SDL-5

Appendix O

T800-XX-800 Engine, Source Selection Evaluation, Statement of Financial Interest

STATEMENT OF FINANCIAL INTEREST

I have read and understand the requirements of:

Army Regulation 600-50, Standard of Conduct for Department of the Army Personnel.

To the best of my knowledge, neither I nor any member of my family have a direct or indirect interest in any of the firms or potential subcontractors submitting proposals for the consideration of the Evaluation Board, which conflict substantially, or appear to conflict substantially, with my duties as a member thereof.

In the event that I later become aware of such a financial interest, I agree to disqualify myself and report this fact to the Chairman of the Evaluation Board and to abide by any instructions which he may give me in this matter.

SIGNATURE

PERMANENT DUTY STATION

DATE

NOTE: The initial statement can be updated after receipt of proposals by attaching of list of all potential prime and sub-contractors.

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Appendix P

National Aeronautics and Space Administration Employees (Other than Special Government Employees) confidential Statement of Employment and Financial Interests (NASA Form 1270)

NASA EMPLOYEES (OTHER THAN SPECIAL GOVERNMENT EMPLOYEES)
CONFIDENTIAL STATEMENT OF EMPLOYMENT AND FINANCIAL INTERESTS
(NASA FORM 1270)

INFORMATION/INSTRUCTION SHEET

A. The information to be furnished on NASA Form 1270 is required by Executive Order 11222, by regulations of the Office of Personnel Management (Chapter 735, Federal Personnel Manual), and by NASA regulations, as set forth in NHB 1900.1B. The information submitted will be handled on a confidential basis as provided in Part D of NHB 1900.1B. The information is to be used to aid the employee and those who review the statement in avoiding conflict of interest situations through advice and counsel. The reason for this is that there are personal criminal sanctions for certain conflict of interest violations (18 U.S.C. 208). This form will be part of a U.S. Office of Personnel Management system of records under the Privacy Act of 1974, entitled "Confidential Employment and Financial Interest Statements — OPM," and maintained by NASA. Following are the routine uses of this system of records identified by the Office of Personnel Management in its notice published in the Federal Register.

"a. To refer, where there is an indication of a violation or potential violation of law, whether civil, criminal or regulatory in nature, to the appropriate agency whether Federal, state, or local charged with the responsibility of investigating or implementing the statute, or rule, regulation or order issued pursuant thereto.

"b. To provide information or disclose to a Federal agency, in response to its request, in connection with the hiring or retention of an employee, or other benefit to the extent that the information is relevant and necessary to the requesting agency's decision on that matter.

"c. As a data source for management information for production of summary descriptive statistics and analytical studies in support of the function for which the records are collected and maintained, or for related personnel management functions or manpower studies; may also be utilized to respond to general requests for statistical information (without personal identification of individuals) under the Freedom of Information Act or to locate specific individuals for personnel research or other personnel management functions."

NASA will take every measure, consistent with law, to assure the confidentiality of these statements. Refusal to provide the requested information may subject the employee to appropriate disciplinary action (see NHB 1900.1B, Part D, Section 404(e) and (f)).

B. NASA employees who are required under NASA regulations to file a NASA Form 1270, "Confidential Statement of Employment and Financial Interests," will be notified of this requirement and of the time and place for filing it by their installation personnel office. NASA employees who are not notified of the requirement to file a NASA Form 1270 are not required to file one. Employees required to file a NASA Form 1270 will be notified annually of this requirement.

C. The filing of a NASA Form 1270 does not exempt an employee in any way from compliance with the laws and NASA regulations relating to outside employment or other outside activity, and the avoidance of conflicting financial interests (see Parts C and D of NHB 1900.1B).

**DETAILED INFORMATION AND INSTRUCTIONS FOR
COMPLETING NASA FORM 1270**

***BLOCK 1: Self-explanatory.**

***BLOCK 2: Self-explanatory; office mail code designators may be used for this purpose.**

***BLOCK 3: POSITION TITLE**

If the title of the NASA position you hold is reasonably descriptive of the nature of the duties you perform, enter only the title. If not, enter additional descriptive information in the space provided, or attach to the form a brief supplementary statement (not a job description) describing your duties, with special emphasis (1) on the degree to which you deal with outside contractors, and (2) on the nature of the contacts you have with them.

BLOCK 4: EMPLOYMENT OTHER THAN WITH NASA (See Part C, NHB 1900.1B)

4a. List the names of all corporations, companies, firms, or other business enterprises, partnerships, nonprofit organizations, educational institutions, or other types of organizations with which you are connected as an employee, officer, owner, director, member, trustee, partner, independent contractor, adviser or consultant. (If you do not have any such connections, enter "None" in Block 4a.)

List any other type of outside employment or other activity for which administrative approval is required under Paragraph 308, NHB 1900.1B.

4b. Enter the date of approval by NASA for any outside employment or other outside activity subject to approval under Paragraph 308, NHB 1900.1B, the amount of compensation, if any, and attach a copy of the approved request to the NASA Form 1270.

4c. Indicate the nature of the duties you perform in a nongovernmental job for which approval of the employment is not required under NASA regulations.

BLOCK 5: FINANCIAL INTERESTS (See Part D, NHB 1900.1B) (If you do not have any reportable financial interests, enter "No reportable interests" in Block 5a.)

General Information

1. The financial interests to be reported (provided they are reportable interests) must include those of the employee, his or her spouse, minor children, and any of his or her blood relatives who are full-time members of his or her immediate household. That is, the financial interests of an employee's parent who lives with him or her are, for purposes of the NASA Form 1270, imputed to the employee, and must be reported, if they are known to the employee (See Par. 2. below); the interests of an employee's in-laws who live with him or her should not be reported because they are not his or her blood relatives.

2. In the event there is information concerning financial interests which might otherwise be reportable but are not known to the employee, such as the identity of securities held under a trust of which the employee's spouse or minor children are the beneficiaries, or the financial interests of a parent who lives with the employee, the employee is not required personally to ascertain the nature of these financial interests, so as to report them. However, if the nature of such interests is known to another person (e.g., the employee's spouse or a trustee, or the parent) the employee should request that person to submit the information directly on his or her behalf, and should report such a request in Block 8 of the NASA Form 1270.

*These blocks may be filled in by either the Installation Personnel Office or the employee.

3. Certain types of financial interests have been exempted from the statutory prohibition against conflicting financial interests (18 U.S.C. 208(a)), and hence should not be reported on NASA Form 1270; these exempted interests are described in Appendix C of NHB 1900.1B. However, there is one exception to this. Notwithstanding the exemption set forth in Paragraph 1a. of Appendix C, the ownership of stocks or other securities in a company doing business with NASA must be reported, even though their aggregate value is \$5,000 or less, if the employee's duties and responsibilities may require the exercise of judgment in making a Government decision or in taking Government action in relation to that company. If the ownership of stocks or other securities in a single company is reported because of this exception, the employee should indicate that their aggregate value is \$5,000 or less, but their exact value does not have to be specified.

4. A savings account in a bank or other savings institution, or an insurance policy, are not considered to be a financial interest in the bank, institution, or insurance company and should not be reported. Ownership of tangible personal property should not be reported unless it is used for income producing purposes. Also, the employee is not required to submit information relating to his or her connection with, or interest in, a professional society; a charitable, religious, social, fraternal, recreational, public service, civil, or political organization; or any similar organization not conducted as a business enterprise and which is not engaged in the ownership or conduct of a business enterprise. However, educational and other institutions doing research and development or related work involving agreements providing money from or contracts with the Government are deemed to be "business enterprises" for purposes of NASA Form 1270, and an employee's interest in them must be reported, if it would otherwise be reportable under Paragraphs 1 through 3 above.

Specific Instructions for Completing Blocks 5a and 5b

Examples of the types of financial interests which should be reported (provided they are reportable interests—see General Information above) are:

- (1) Ownership of shares of common or preferred stock, including warrants to purchase such shares, and of bonds or other securities in a corporation or other business organization or entity.
- (2) An interest in a partnership, and interests held as joint assets of the partnership.
- (3) When the interest is a beneficial interest or a vested remainder under a trust, the ownership by the trust of stocks, bonds or other corporate securities.
- (4) Continued participation in a profit-sharing or stock bonus plan that is maintained by an organization of which you are a former employee.

The amount or value of a financial interest need not be reported. For example, the number or value of shares of stock owned in a corporation need not be specified except to the extent indicated in Paragraph 3 of "General Information" above. However, if an interest is not exempt from reporting, it should be reported regardless of value.

BLOCK 5a: In listing ownership of stocks, bonds, or other securities, only the name of the corporation or the organization need be shown, provided it is a widely known organization which is readily identifiable by its name (e.g., General Motors). When the organization is not readily identifiable by its name, you should identify the kind of organization it is (e.g., corporation, partnership, etc.) and the nature of the business or activity in which it is engaged (e.g., aerospace, utility, etc.).

BLOCK 5b: Specify the type of financial interest (e.g., stocks, bonds, warrants, partnership interest, etc.)

BLOCK 6: INTERESTS IN REAL PROPERTY (If you have no interests in real property to report, enter "None" in Block 6a.)

6a. Indicate the nature of your interests in real property, such as ownership, mortgagee, lienholder, lessor; or an interest in a real estate investment trust. Ownership of property occupied as a personal residence should not be listed.

6b. Specify the type of property involved, using such descriptive terms as house, apartment, store, farm, undeveloped land, etc.

6c. Give the address or location of property.

BLOCK 7: CREDITORS (If you have no creditors of the type on which a report should be made, enter "None" in Block 7a.)

7a. Enter the names of your creditors, other than those to whom you may be indebted by reason of a mortgage or similar debt on property which you occupy as a personal residence, or creditors to whom you may be indebted for current and ordinary household and living expenses, such as household furnishings, automobile, education, vacation, and similar expenses. However, these exclusions do not apply if the creditor is a NASA contractor or is seeking a NASA contract, or is an employee of either; such creditors should therefore be reported.

7b. Characterize the type of indebtedness, such as personal loan, mortgage, second mortgage, chattel mortgage, note, etc.

BLOCK 8: INFORMATION REQUESTED OF OTHER PERSONS (If no such information has been requested of others, enter "None" in Block 8a.)

If any information required for Block 5 is to be supplied by other persons, such as your spouse, relative, trustee, attorney, or accountant, indicate the name and address of each such person, the date on which you requested the information to be supplied, and the nature of the information requested.



**NASA Employees (Other Than Special Government Employees)
Confidential Statement of Employment and Financial Interests**
(Please read attached Information/Instruction Sheet before preparing)

Installation	
1. NAME	
Last	First Initial
2. INTERNAL ORGANIZATIONAL ELEMENT	
3. POSITION-TITLE	
4. EMPLOYMENT (Other Than With NASA) (If Inapplicable, Indicate "None")	
a. Name and Kind of Organization(s) and Amount of Compensation	b. Date Approved by NASA (Attach Copy of Approval)
c. Nature of Employment, Duties and Compensation Where Approval is Not Required	
5. FINANCIAL INTERESTS (If You Have no Reportable Interests, so Indicate)	
a. Name and Kind of Organization(s) or Entity	b. Nature of Financial Interests
Reviewed by:	Date:

6. INTERESTS IN REAL PROPERTY (If You Have no Reportable Interests, so Indicate)		
a. Nature of Interest	b. Type of Property	c. Address or Location of Property
7. CREDITORS (If You Have no Reportable Interests, so Indicate)		
a. Name of Creditors	b. Character of Indebtedness	
8. INFORMATION REQUESTED OF OTHER PERSONS (If Inapplicable, Indicate "None")		b. Date of Request
a. Name and Address of Persons Requested to Furnish Information		
c. Nature of Matter Concerning Which Request Was Made		
<p>CERTIFICATION: I certify that within the past 30 days I have read NIH 1900.1 and the statements I have made herein are true, complete and correct to the best of my knowledge and belief, and understand that the filing of this statement does not exempt me from complying with the laws and NASA regulations relating to outside employment and the avoidance of conflicting financial interests.</p>		
<p>_____ <i>Signature</i></p>		<p>_____ <i>Date</i></p>



**NASA Employees (Other Than Special Government Employees)
Confidential Statement of Employment and Financial Interests**
(Please read attached Information/Instruction Sheet before preparing)

		Installation
1. NAME		2. INTERNAL ORGANIZATIONAL ELEMENT
Last	First Initial	
3. POSITION-TITLE		
4. EMPLOYMENT (Other Than With NASA) (If Inapplicable, Indicate "None") a. Name and Kind of Organization(s) and Amount of Compensation		b. Date Approved by NASA (Attach Copy of Approval)
c. Nature of Employment, Duties and Compensation Where Approval is Not Required		
5. FINANCIAL INTERESTS (If You Have no Reportable Interests, so Indicate) a. Name and Kind of Organization(s) or Entity		b. Nature of Financial Interests
Reviewed by:		Date:

6. INTERESTS IN REAL PROPERTY (If You Have no Reportable Interests, so Indicate)		
a. Nature of Interest	b. Type of Property	c. Address or Location of Property
7. CREDITORS (If You Have no Reportable Interests, so Indicate)		
a. Name of Creditors	b. Character of Indebtedness	
8. INFORMATION REQUESTED OF OTHER PERSONS (If Inapplicable, Indicate "None")		b. Date of Request
a. Name and Address of Persons Requested to Furnish Information		
c. Nature of Matter Concerning Which Request Was Made		
<p>CERTIFICATION: I certify that within the past 30 days I have read NHB 1900.1 and the statements I have made herein are true, complete and correct to the best of my knowledge and belief, and understand that the filing of this statement does not exempt me from complying with the laws and NASA regulations relating to outside employment and the avoidance of conflicting financial interests.</p>		
<p>_____ <i>Signature</i></p>		<p>_____ <i>Date</i></p>

Appendix Q

Knowledge Certificate

1. I certify that I have read and understand the requirements of Department of Defense Directive 4105.62 (Selection of Contractual Sources for Major Defense Systems) and 5000.43 (Acquisition Streamlining), Federal Acquisition Regulation (FAR) Subpart 15.6 (Source Selection), Acquisition Letter 85-43, Army Materiel Command (AMC) FAR Supplement Subpart 15.6 (Source Selection), and the 715-3 series of AMC Pamphlets 715-3 on the source selection process, administration and lessons learned.

2. I certify that I have read and understand the following documents or cited portions of the following documents that apply to my role in the source selection of (insert description of acquisition):

a. Statement of Work _____

_____ paragraphs _____

b. Source Selection Plan _____

c. Solicitation No. _____

d. The following document furnished by the SSA, SSAC, and SSEB.

i. _____

ii. _____

iii. _____

etc. _____

Signature _____

Printed Name _____

Source Selection Role _____

Home Station _____

Date _____

Appendix R

National Aeronautics and Space Administration, Marshall Space Flight Center,
Professional Individual Certificate for Source Evaluation Board Participant

Professional

INDIVIDUAL CERTIFICATE FOR SOURCE EVALUATION BOARD PARTICIPANT

In the Source Evaluation Board proceedings for the procurement of

_____, I, the undersigned, understand that (1) under NASA Regulations, personnel who participate in any way in evaluation proceedings are prohibited from revealing any information concerning the evaluation underway to anyone who is not also participating in the same proceedings, and that disclosure to another participant is permitted only to the extent that such information is required in connection with such proceedings; and (2) that 18 U.S.C. 1905 prohibits any officer or employee of the United States from disclosing or divulging, in any manner or to any extent not authorized, certain kinds of confidential information that concerns or relates to trade secrets, processes, confidential statistical data, and similar business information.

I have read and understand the "Source Evaluation Board Manual" (NHB 5103.6A) and the regulations pertaining to the "Standards of Conduct for NASA Employees" as set forth in NHB 1900.1B, and certify and agree that (1) I have duly filed (or will so file prior to participating in the subject proceedings) a confidential Statement of Employment and Financial Interest (NASA Form 1270) in accordance with the requirements of that regulation; and (2) if I have since acquired, or should discover I have a direct or indirect financial interest in an organization submitted (or requested to submit) a proposal to be evaluated by the Board or committee on which I am serving, (or am scheduled to serve) or in a proposed subcontractor identifiable in a proposal or in evaluation discussions, I shall promptly report the nature of my interest, through my Board or Committee Chairman, to the person who appointed me to the Board or Committee; and I understand that my participation in the proceedings is prohibited if I have a financial interest in such an offeror, organization or subcontractor, unless a waiver is granted under paragraph 403 of NHB 1900.1B.

I recognize that a reportable interest includes any which I, my spouse, minor child, partner, or an organization with which I am already connected in any of various ways or with which I am negotiating concerning prospective employment, may have or has in any such offeror, organization, or proposed subcontractor. Also, I realize that any breach by me of my obligation to safeguard and not to make unauthorized disclosure of information concerning the subject evaluation may result in appropriate disciplinary, administrative or other action as provided by regulation or law.

Such direct or indirect financial interest includes:

a. Any financial interest such as direct or trust interest in stocks, bonds, and other rights, and or continued participation in employee benefit or welfare plans with profit sharing or stock bonus provisions which arose out of former employment; or

b. Any current service as an officer, director, trustee, partner or employee, or any current negotiations for employment or any arrangements concerning prospective employment; or

c. A close family relationship to an official of a proposal; or

d. Any other interest or connection which might create the appearance of employee use of public office for private gain, or the giving of preferential treatment to any organization or person; or which might tend to subject NASA to criticism on the grounds that an employee interest or connection could impair the objectivity of the participating Board or Committee member.

Financial interest such as ownership of stocks or other securities are reportable, even though usually exempt under paragraph 1a of Appendix C, NHB 1900.1B when valued at \$5,000 or less, and listed on certain stock exchanges, and when in a company doing business with NASA, if the employee's duties may require him to take certain actions in relation to that company.

Signature

Date

Appendix S

National Aeronautics and Space Administration, Marshall Space Flight Center,
Clerical Individual Certificate for Source Evaluation Board Participant

Clerical

INDIVIDUAL CERTIFICATE FOR SOURCE EVALUATION BOARD PARTICIPANT

In the Source Evaluation Board proceedings for the procurement of

_____, I, the undersigned, understand that; (1) under NASA Regulations, personnel who participate in any way in evaluation proceedings are prohibited from revealing any information concerning the evaluation underway to anyone who is not also participating in the same proceedings, and that disclosure to another participant is permitted only to the extent that such information is required in connection with such proceedings; and (2) that 18 U.S.C. 1905 prohibits any officer or employee of the United States from disclosing or divulging, in any manner or to any extent not authorized, certain kinds of confidential information that concerns or relates to trade secrets, processes, confidential statistical data, and similar business information. Also, I realize that any breach by me of my obligation to safeguard and not to make unauthorized disclosure of information concerning the subject evaluation may result in appropriate disciplinary, administrative or other action as provided by regulation or law.

Signature

Date

Appendix T

Generic Board Operating Procedures

XYZ SYSTEM SOURCE SELECTION EVALUATION BOARD

ABC COMMAND

BOARD OPERATING PROCEDURES (BOPs)

<u>BOP NUMBER</u>	<u>TITLE</u>
1	PERSONNEL IN-PROCESSING PROCEDURE
2	SECURITY PROCEDURES
3	STANDARDS OF CONDUCT
4	PARKING
5	USE OF TELEPHONES
6	HOURS OF DUTY
7	TIME AND ATTENDANCE REPORTING
8	CLAIM FOR REIMBURSEMENT FOR EXPENDITURES ON OFFICIAL BUSINESS STANDARD FORM 1164
9	CONTROL OF REPRODUCTION
10	TYPING POOL PROCEDURES
11	OFFERORS REQUESTS FOR REQUESTS FOR PROPOSAL (RFP) CLARIFICATION
12	ERROR, OMISSION OR CLARIFICATION (EOC) REPORTING
13	AMENDMENTS TO REQUEST FOR PROPOSAL (RFP)
14	"EYES ONLY"/BACK CHANNEL MESSAGES
15	LESSONS LEARNED REPORTS
16	DEPARTURE CLEARANCE PROCEDURES

BOARD OPERATING
PROCEDURE NO. 1

PERSONNEL IN-PROCESSING PROCEDURE

	PARA	PAGE
PURPOSE.....	1	1
SCOPE.....	2	1
RESPONSIBILITIES.....	3	1
PROCEDURES.....	4	1

1. PURPOSE. The purpose of this procedure is to provide guidance for processing of incoming personnel for admittance to XYZ System SSEB physical location.

2. SCOPE. Applicable to all Source Selection Evaluation Board (SSEB) personnel, advisors, and consultants.

3. RESPONSIBILITIES. The Special Assistant for Administration and Support has supervision over all in-processing procedures.

4. PROCEDURES.

a. Immediately upon arrival, incoming personnel assigned to the SSEB will report to the receptionist desk of Building ____ and:

(1) Submit two copies of their travel orders and one copy of their security clearance.

(2) Submit signed Financial Statement, Nondisclosure Statement, and Rules of Conduct.

(3) Obtain their SSEB Security Badge.

b. The following are to be completed within three working days after arrival and submitted to Area Secretary to be forwarded to Administrative Area:

(1) Emergency Data Form.

(2) Vehicle Registration Form (out-of-town personnel only).

(3) Professional Qualification Summary Form. (Appendix A)

Chairman
XYZ System
Source Selection Evaluation Board

PROFESSIONAL QUALIFICATION SUMMARY

NAME _____ Grade Series/or Rank/MOS _____
Last First Initial

HOME STATION _____
Organization City & State

POSITION AT HOME STATION _____

EDUCATION (Degrees held, semester hours earned; show major)

PREVIOUS EVALUATION EXPERIENCE (Identify boards, teams, ad hoc groups, etc.,
and positions held)

XYZ SYSTEM SOURCE SELECTION EVALUATION BOARD ASSIGNMENT (Area & Job Title)

YEAR OF EXPERIENCE

Civilian (Industry) _____

Civil Service _____

Military _____

EXPERTISE (i.e., Military MOS, Cost Analyst, Hydraulics, Weight & Balance)

AWARDS (Honors, Accomplishments, Etc.)

Appendix A to BOP 1

BOARD OPERATING
PROCEDURE NO. 3

STANDARDS OF CONDUCT

	PARA	PAGE
PURPOSE	1	1
SCOPE	2	1
RESPONSIBILITIES	3	1
POLICY	4	1
PROCEDURES	5	2
REFERENCES	6	2

1. PURPOSE. The purpose of this procedure is to provide guidance for personnel and professional conduct relative to Source Selection Evaluation Board (SSEB) matters.

2. SCOPE. Applicable to all SSEB personnel, advisors, and consultants.

3. RESPONSIBILITIES. Each individual has the responsibility to safeguard all SSEB related matters, verbal and written, and to remain above reproach in the personal and professional relationship with the Board.

4. POLICY. Due to the competing Offerors' intense interest in the deliberations of this Board, the inadvertent release of information could be a source of considerable misunderstanding and embarrassment to the Government. Therefore, the following policy items are mandatory for all SSEB personnel:

a. Do not permit members of your parent organization to divulge your membership on the Evaluation Board to casual callers.

b. Under no circumstances accept any invitation from Offeror personnel for participation in any affair regardless of how remote it may be from the Source Selection action.

c. Do not assume a non-participating contractor can be told anything pertaining to this Source Selection Process.

d. Do not discuss any aspect of the Source Selection with other Board members outside the area designated for deliberations.

e. Do not assume it is safe to speak of the Source Selection because you are among Government employees or are in Government buildings or offices.

f. Do not discuss substantive issues of the Source Selection with any unauthorized individual even after the announcement of the winning contractor.

g. Your normal (home station) supervisor does not have a "need-to know" on any aspect of the Board proceedings.

BOP NO. 3

5. PROCEDURES. Any SSEB member having knowledge of a compromise (actual or attempted) of Sensitive information will report the compromise to the appropriate Area Chief or to the Special Assistant for Administration and Support.

6. REFERENCES. AR 600-50

Chairman
XYZ System
Source Selection Evaluation Board

BOARD OPERATING
PROCEDURE NO. 4

PARKING

	Para	Page
PURPOSE	1	1
SCOPE	2	1
RESPONSIBILITIES	3	1
PROCEDURES	4	1
REFERENCE	5	2

1. PURPOSE. The purpose of this procedure is to provide guidance for the parking of privately owned conveyance of personnel assigned to and/or on official business with the Source Selection Evaluation Board (SSEB) at Building ____, ABC Command.

2. SCOPE. Applicable to all SSEB personnel, advisors, and consultants.

3. RESPONSIBILITIES. The Special Assistant for Administration and Support has the responsibility to ensure compliance with parking procedures as set forth herein and in accordance with guidelines as set forth by the ABC Command Security Office.

4. PROCEDURES.

a. No parking will be permitted within 20 feet of any building, except in special and/or designated parking spaces. Further exceptions are authorized for service and transport vehicles when loading or unloading or when such parking does not constitute a hazard and the driver remains in the vicinity of the parked vehicle.

b. Parking is also restricted in areas designated "NO PARKING" and/or in front of the doors marked "FIRE SPRINKLER CONTROL" and "FIRE DOOR." It is suggested that personnel park at least eight feet in either direction from "NO PARKING" signs.

c. No parking will be permitted in any direction within 15 feet of a fire hydrant.

d. Parking spaces designated by a "_" are reserved.

e. No parking will be permitted on the grass.

5. REFERENCE. AMC Command Reg. XXX-X.

Chairman
XYZ System
Source Selection Evaluation Board

BOARD OPERATING
PROCEDURE NO. 5

USE OF TELEPHONES

	Para	Page
PURPOSE.....	1	1
SCOPE.....	2	1
POLICY.....	3	1
RESPONSIBILITIES.....	4	1
PROCEDURES.....	5	1

1. PURPOSE. The purpose of this procedure is to provide guidance for telephone usage and procedures that will be utilized within Building _____, ABC Command.

2. SCOPE. Applicable to all Source Selection Evaluation Board (SSEB) personnel, advisors, and consultants.

3. POLICY.

a. No SSEB information relating to sensitive activities within Building _____ will be discussed on the telephone.

b. SSEB participants will not accept or place telephone calls to Offerors. These type calls will be handled only by the Contracting Officer (KO).

c. Incoming calls are highly discouraged within the confines of Building _____. Because of the nature of the material being used, discussions of sensitive information could occur if numerous telephone calls are made and received by the evaluators.

d. All incoming and outgoing FTS, WATS, Commercial and AUTOVON calls in Building _____ will be logged by subject and person calling or being called. (See Appendix A, Telephone Log).

e. Telephone dialing instructions from ABC Command are attached as Appendix B.

4. RESPONSIBILITIES. The Special Assistant for Administration and Support has the overall responsibility for the control of telephone usage.

5. PROCEDURES.

a. Each SSEB participant will fill out the telephone log (Appendix A) when placing or receiving telephone calls.

BOP NO. 5

b. This log will be turned in to the Area Secretary, who, in turn, will consolidate (by date) and forward to the Administrative Officer on the first work day of each week.

Chairman
XYZ System
Source Selection Evaluation Board

OUTGOING OUTGOING OUTGOING OUTGOING OUTGOING OUTGOING OUTGOING

COMMERCIAL/AUTOVON/FTS/WATS TELEPHONE LOG

NAME/AREA

[illegible]

TURN IN TO AREA SECRETARY ON THE LAST DAY OF THE WEEK

TELEPHONE DIALING INSTRUCTIONS

1. To dial local numbers with the following prefixes dial ____.

2. DIALING INSTRUCTIONS - ABC Command

DIAL ____--Operator Assistance

DIAL ____--AUTOVON Access

DIAL 7 for WATS and FTS lines

DIAL ____ Digit Extension--for ____ numbers at same location

DAIL _____--To book overseas AUTOVON CALLS

APPENDIX B TO BOP 5

BOARD OPERATING
PROCEDURE NO. 6

HOURS OF DUTY

	PARA	PAGE
PURPOSE.....	1	1
SCOPE.....	2	1
POLICY.....	3	1
PROCEDURES.....	4	1

1. PURPOSE. This procedure defines the normal duty hours and procedure for overtime for Source Selection Evaluation Board (SSEB) members.

2. SCOPE. Applicable to all SSEB personnel, advisors, and consultants.

3. POLICY.

a. Normal duty hours for SSEB participants is ____ to ____, Monday through Friday with ____ minutes for lunch.

b. Overtime (when authorized) will not normally exceed ____ hours on weekdays (____) and ____ hours on Saturdays.

c. Exceptions to the above working hours may be made by Area Chiefs when special requirements dictate.

4. PROCEDURES.

a. Prior approval by Area Chief is required for overtime or change of hours.

b. An estimate of overtime hour requirements will be submitted by Area Chiefs to the Administrative Area prior to the week in which it will be worked (See Appendix A).

c. Area Chiefs will advise members of overtime requirements as early as possible.

Chairman
XYZ System
Source Selection Evaluation Board

ROUTING AND TRANSMITTAL SLIP		Date
TO: (Name, office symbol, room number, building, Agency/Post)		Initials Date
1. Administrative Area		
2.		
3.		
SUBJECT: Anticipated Overtime		
4. ment for Week End		
5.		
Action	File	and Return
Approval	For Cle	er Conversation
As Requested	For C	Prepare Reply
Circulate		See Me
Comment		Signature
Coordination		

REMARKS

☐ MONDAY-FRIDAY

☐ per day ☐ Other (Specify)

☐ people

SATURDAY (8 hours)

☐ Other (Specify)

☐ SUNDAY

☐ No. of people

☐ No. of hours

☐ OTHER

DO NOT use this form as a RECORD of approvals, concurrences, disposals, clearances, and similar actions

FROM: (Name, org. symbol, Agency/Post)	Room No.—Bldg.
Chief, _____ Area	Phone No.

5041-102
☆ U.S. G.P.O. 1983-414-517

OPTIONAL FORM 41 (Rev. 7-76)
Prescribed by GSA
FPMR (41 CFR) 101-11.206

XYZ SYSTEM SOURCE SELECTION EVALUATION BOARD
ABC COMMAND

BOARD OPERATING
PROCEDURE NO. 7

TIME AND ATTENDANCE REPORTING

	PARA	PAGE
PURPOSE.....	1	1
SCOPE.....	2	1
GENERAL.....	3	1
POLICY.....	4	1
RESPONSIBILITIES.....	5	1
PROCEDURES.....	6	2
REFERENCES.....	7	3

1. PURPOSE. The purpose of this procedure is to establish a uniform method of recording normal hours worked, overtime worked, sick and annual leave taken.

2. SCOPE. Applicable to all Source Selection Evaluation Board (SSEB) personnel, advisors and consultants.

3. GENERAL. The information collected by the following method will be used to:

a. Certify time and attendance as well as overtime to the respective installations.

b. Accumulate costs and manhours in support of the SSEB.

4. POLICY.

a. Time and Attendance Sheets will be annotated daily by each participant of the SSEB (Appendix A).

b. Annual and sick leave will be recorded on Time Card (DA Form 4395) for all personnel serviced by the ABC Command Finance and Accounting Office (F&AO).

c. The Area Chiefs will verify Time and Attendance Sheets.

d. Overtime will be used only as required to meet established SSEB schedules and must be approved by the Area Chief.

BOP NO. 7

5. RESPONSIBILITIES.

a. Each employee will complete Time and Attendance Sheets at the end of each work day. Employee will also complete Application for Leave (SF 71) or initial time card for annual and sick leave, and give to Area Secretary.

b. Labor Production Report (local Form) for personnel serviced by ABC Command F&AO will be prepared by the individual, using work unit code " " for SSEB Activities, and turned in to Area Secretary by COB on the last day of the month.

c. Military personnel will complete the Time and Attendance Sheet by filling out TOTAL hours column only.

d. Area Secretary will maintain: Time and Attendance Sheets, for all personnel, Time Cards, Labor Exception Records (local Form) and Labor and Production Reports for all personnel serviced by ABC Command F&AO.

e. Area Chiefs will verify and sign Time and Attendance Sheet for each employee.

f. The Administrative Office will take necessary action to certify Time and Attendance Sheets, Time Cards, Labor Exception Records and Labor and Production Reports to appropriate offices.

6. PROCEDURES.

a. Each Area Chief will submit an estimate of his overtime hour requirements to the Administrative office for each week by COB of the last day of the existing week. (Appendix A, BOP 6).

b. Each Area Chief will designate a convenient location for Time and Attendance Sheets for civilian and military personnel to complete at the end of each day.

c. Each employee will post his Time and Attendance Sheet at the end of each day by entering time and his initials in the appropriate columns. Personnel serviced by ABC Command F&AO will prepare Labor and Production Report.

d. Each Area Secretary will:

(1) Prepare separate Time and Attendance Sheets for each civilian and military Board member and place in the designated location.

(2) At the beginning of each day, check Time and Attendance Sheets to insure that previous day's time and attendance was correctly recorded and post time cards.

(3) Upon close of business of the last day of the pay period, complete Time and Attendance Sheets (for all personnel), Time Cards, Labor Exception Reports and Labor and Production Reports all personnel serviced by the ABC Command F&AO.

BOP NO. 7

(4) Call Home organization of the individuals working part time.

e. Administrative Area will:

(a) Obtain Time Cards for personnel serviced by the ABC Command F&AO and distribute to the appropriate Areas.

(b) Handcarry Labor and Production Reports to the ABC Command on the first work day following the close of the reporting period.

(c) Handcarry Time Cards, Labor Extension Records and Approved Overtime Request on Monday following close of reporting period to the ABC Command F&AO.

(d) Call Home organization for civilian personnel other than those serviced by the ABC Command F&AO.

7. REFERENCE. Local Regulation XX-XX, and AMC Regulation 616-4.

Chairman
XYZ System
Source Selection Evaluation Board

XYZ SYSTEM SOURCE SELECTION EVALUATION BOARD
ABC COMMAND

BOARD OPERATING
PROCEDURE NO. 8

CLAIM FOR REIMBURSEMENT
FOR EXPENDITURES ON OFFICIAL BUSINESS
STANDARD FORM 1164

	PARA	PAGE
PURPOSE.....	1	1
SCOPE.....	2	1
DEFINITIONS.....	3	1
GENERAL.....	4	1
RESPONSIBILITIES.....	5	2
PROCEDURES.....	6	2
REFERENCES.....	7	3

1. PURPOSE. To establish procedures for processing Claim For Reimbursement For Expenditures on Official Business, Standard Form (SF) 1164, and NonAvailability of Official Transportation for Local Travel, Privately-owned Vehicle Authorization, Local Form XXXX.

2. SCOPE. This procedure is applicable to personnel permanently assigned to the ABC Command during their participation on the Source Selection Evaluation Board (SSEB).

3. DEFINITIONS.

a. Certifying Officer. The individual designated by the SSEB Chairman as being responsible for authenticating SF 1164.

b. Approving Officer. The Transportation Coordinator in the ABC Command Transportation Office.

c. Claimant. The individual approved by the approving officer authorized to file claim for reimbursement for expenditures.

4. GENERAL.

a. Mileage reimbursement for privately-owned conveyance (POC) will be in accordance with Joint Travel Regulation (JTR), Paragraph C2153 and C4653 and Local Regulation XX-X.

(1) The ABC Command policy requires that employees report to their principal work site and then to alternate work site(s) and back, when assigned to locations away from the normal duty assignment.

BOP NO. 8

(2) Employees authorized POC use for local travel will be paid mileage expense based on the actual established distance from the employees principal work site to assigned alternate work site(s). If parking or bridge tolls expenses are incurred, they will be added to the mileage allowance.

(3) If, for personal convenience, employees elect to proceed directly to the alternate duty site from their residence and/or return, their reimbursement will be computed based on actual mileage, not to exceed the mileage from principal work site to alternate work site as specified above.

b. Mileage for use of POC for other reasons during working hours when used in the capacity of official business in connection with the SSEB can be claimed when specifically authorized by the Chairman, Deputy Chairman or the Special Assistant for Administration and Support.

5. RESPONSIBILITIES.

a. Claimant shall furnish legible information to the Area Secretaries on mileage and tolls (if applicable) for preparation of SF 1164.

b. Authorized Certifying Officer shall review and approve SF 1164 and Local Form XXXX.

6. PROCEDURES.

a. Claimant shall submit request for reimbursement on SF 1164. Requests should be submitted on the first work day of each month for the preceding month or, if individual prefers, upon completion of duty with the SSEB.

b. Area Secretaries will:

(1) Prepare SF 1164 for all personnel within their area from information provided by the claimant and have the claimant sign the completed form.

(2) Prepare Local Form XXXX for each SF 1164 submitted.

c. An original carbon set of the completed SF 1164 and two copies of Local Form XXXX shall be given to the Special Assistant for Administration and Support for approval and certification. The Special Assistant for Administration and Support will make three copies (one for the XYZ System PMO, one for file and one to be returned to the claimant) and forward the original to the ABC Command Transportation Office.

d. The ABC Command Transportation Coordinator shall sign as Approving Officer on SF 1164 and Local Form XXXX and forward to the ABC Command Finance Office for payment.

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7. REFERENCES.

- a. JTR, Volume 2, Paragraphs C2153 and C4653.
- b. Local Regulation XX-X.

Chairman
XYZ System
Source Selection Evaluation Board

XYZ SYSTEM SOURCE SELECTION EVALUATION BOARD
ABC COMMAND

BOARD OPERATING
PROCEDURE No. 9

CONTROL OF REPRODUCTION

	PARA	PAGE
PURPOSE.....	1	1
SCOPE.....	2	1
POLICY.....	3	1
RESPONSIBILITIES.....	4	1
PROCEDURES.....	4	1

1. PURPOSE. The purpose of this procedure is to define responsibilities for control of reproduction of documents.

2. SCOPE. Applicable to all Source Selection Evaluation Board (SSEB) personnel, advisors, and consultants.

3. POLICY.

a. No classified material may be reproduced on the equipment in Building ____.

b. No part of the Offerors' proposals may be reproduced without the express consent of the Chairman, Deputy Chairman, or Contracting Officer.

c. Reproduction will be kept to the minimum required for efficient operation of the Board.

4. RESPONSIBILITIES. The Special Assistant for Administration and Support has overall responsibility for reproduction to include the control and operation of all reproduction equipment.

5. PROCEDURES.

a. Assigned Operator. An operator will be assigned to the reproduction machine during normal duty hours to:

(1) Operate the equipment.

(2) Add or change paper when required.

(3) Take corrective action in case of stoppage/malfunction of equipment.

BOP NO. 9

b. Normal/Routine Reproduction.

(1) A Request for Reproduction slip (Appendix A), will accompany all incoming requests.

(2) The material will be reproduced by the assigned operator.

(3) The original and reproduced copies will be placed in the individual Area "out" basket.

(4) A one sheet reproduction may be requested and received immediately.

c. Classified Reproduction. All classified material requiring reproduction will be handcarried to the Special Assistant for Administration and Support.

d. Priority Reproduction. Requirements for large volume or priority reproduction will be coordinated with the Special Assistant for Administration and Support as early as possible. Arrangements can be made for after duty reproduction by the Special Assistant for Administration and Support personnel on a case-by-case basis.

e. Reproduction After Normal Duty Hours. Area Secretaries may use the equipment when an operator is not available. An individual from the Special Assistant for Administration and Support will be present in the building whenever personnel are working and will correct all malfunctions.

Chairman
XYZ System
Source Selection Evaluation Board

REQUEST FOR REPRODUCTION

ORIGINATOR _____

AREA _____ DATE _____

_____ NO OF ORIGINALS

_____ COPIES PER PAGE

Check all blocks applicable.

☐ Collate

☐ Staple

☐ Duplex (both sides)

☐ Reduce to _____
size

☐ Other _____
specify .

SIZE PAPER

☐ 8 1/2 X 11

☐ 8 1/2 X 14

☐ ROUTINE

☐ PRIORITY

APPENDIX A TO BOP 9

XYZ SYSTEM SOURCE SELECTION EVALUATION BOARD
ABC COMMAND

BOARD OPERATING
PROCEDURE NO. 10

TYPING POOL PROCEDURES

	PARA	PAGE
PURPOSE.....	1	1
SCOPE.....	2	1
POLICY.....	3	1
RESPONSIBILITIES.....	4	1
PROCEDURES.....	5	2

1. PURPOSE. The purpose of this procedure is to establish a uniform method for processing and controlling the typed material emanating from the Source Selection Evaluation Board.

2. SCOPE. Applicable to all Source Selection Evaluation Board (SSEB) personnel, advisors, and consultants.

3. POLICY.

a. All Evaluation material, i.e. Factors/Subfactors Score Sheets, Summary Score Sheets, Errors, Omissions and Clarifications, Lessons Learned, Professional Qualification Summary Forms to be typed will be processed through the Typing Pool Lead Operator.

b. All other material, i.e. DFs, letters, SF 1164, DD 1610, etc. will be typed or revised.

c. Typing Pool Routing Slip (See Appendix A) will be attached to all material to be typed or revised.

4. RESPONSIBILITIES.

a. The Special Assistant for Administration and Support has overall responsibility for the control of the Typing Pool.

b. Area Chiefs will verify any priority work by initialing the Typing Pool Routing Slip.

c. Area Secretaries will insure that proper directions are on the Typing Pool Routing Slip.

d. Typing Pool Lead Operator will:

(1) Distribute material to Word Processing operators.

BOP NO. 10

- (2) Insure that all typing is completed in a timely manner.
- (3) Check all typed material for format only.
- (4) Forward production log to Administration Area each Monday.

e. Word Processing Operators will type and revise all Evaluation material.

5. PROCEDURES.

a. Evaluators will complete a Typing Pool Routing Slip, attach it to the material to be typed and give it to the Area Secretaries. Area Secretaries will review the Typing Pool Routing Slip and forward the typing to the Typing Pool Lead Operator.

b. Typing Pool Lead Operator will distribute work to Word Processing operators.

c. When typing is complete, Word Processing operators will request spelling check and request two copies to be printed.

d. Typing Pool Lead Operator will review for correct format and put completed material in Area "out" box.

e. Area Secretary will pick up completed material and distribute to originator for review.

f. If corrections are required, corrections will be made on the originals and returned to the typing pool. Under no circumstances will an evaluator give corrections to Area Secretaries to white out or retype.

Chairman
XYZ System
Source Selection Evaluation Board

TYPING POOL
ROUTING SLIP

Originator _____

Area _____ Date _____

JOB_CLASSIFICATION

☐ New ☐ Routine
☐ Revision _____ ☐ Priority
(Area Chiefs Initial)

TYPE_OF_DOCUMENT

☐ Final Copy ☐ Single Space
☐ Rough Draft ☐ Double Space
☐ Other _____
Specify _____

STATIONERY

☐ Letter
☐ Memo
☐ DF
☐ Other _____
Specify _____

DATE/TIME_IN

DATE/TIME_OUT

APPENDIX A TO BOP 10

XYZ SYSTEM SOURCE SELECTION EVALUATION BOARD
ABC COMMAND

BOARD OPERATING
PROCEDURE NO. 11

OFFERORS REQUESTS FOR
REQUESTS FOR PROPOSAL (RFP) CLARIFICATION

	PARA	PAGE
PURPOSE.....	1	1
SCOPE.....	2	1
POLICY.....	3	1
RESPONSIBILITIES.....	4	1
PROCEDURES.....	5	2

1. PURPOSE. The purpose of this procedure is to establish a uniform method of responding to Offerors' questions to the Government.

2. SCOPE. Applicable to all Source Selection Evaluation Board (SSEB) personnel, advisors, and consultants.

3. POLICY.

a. The process outlined in this procedure will be used to prepare responses by SSEB personnel to Offerors' queries. Questions from other industry representatives will be staffed and answered as deemed appropriate by the Contracting Officer (KO).

b. Requests for RFP Clarification will be answered in the shortest possible time and no later than three working days. Should the complexity of a question require a period of time in excess of three working days, the Offeror will be so notified by the KO if deemed appropriate. The Executive Officer will advise the KO when a delay is anticipated.

c. The question and the Government's answer will be furnished to each Offeror when appropriate (as determined by the KO). The identification of the originator of the question will not be disseminated outside the SSEB.

d. Questions concerning classified information will be handled in accordance with existing security regulations.

4. RESPONSIBILITIES.

a. Contracting Officer (KO). Receive all Requests for RFP Clarification and pass them to the Chairman, SSEB. Receive responses from the Chairman and distribute them to the Offerors.

b. Chairman. Review questions and assign to appropriate Area Chiefs for action. Review and approve responses and forward them to the KO.

BOP NO. 11

c. Area Chiefs. Prepare responses to Requests for RFP Clarification insuring that the answer is coordinated with other Area Chiefs, the XYZ System Project Manager, and the KO, as appropriate. Requests will be retyped to remove the identification of the originator.

d. Executive Officer. Maintain a master file of all Requests for RFP Clarification forwarded to the SSEB. Prepare copies of requests and responses for the Offerors.

5. PROCEDURES.

a. The KO will furnish each Offeror with a letter outlining the procedure for requesting RFP clarification.

b. The KO will receive requests from the offerors and immediately pass them to the Chairman of the SSEB. The Chairman will assign the requests to the appropriate Area Chief through the Executive Secretary who will keep a suspense log of each separate request.

c. The Area Chief will insure that appropriate staffing and coordination of the answer is accomplished. The Area Chief will return the request and response to the Chairman for review. The Executive Secretary will maintain a master file of all requests and answers and will prepare copies for the Offerors.

d. After review, all copies of requests and answers will be passed to the KO for dissemination to the Offerors.

e. Requests for RFP Clarification on the same subject by more than one Offeror will be processed and distributed as outlined above. When appropriate, separate requests may be consolidated.

Chairman
XYZ System
Source Selection Evaluation Board

XYZ SYSTEM SOURCE SELECTION EVALUATION BOARD
ABC COMMAND

BOARD OPERATING
PROCEDURE NO. 12

ERROR, OMISSION OR CLARIFICATION (EOC) REPORTING

	PARA	PAGE
PURPOSE.....	1	1
SCOPE.....	2	1
GENERAL.....	3	1
POLICY.....	4	1
RESPONSIBILITIES.....	5	1
PROCEDURES.....	6	4
INTERNAL COORDINATION.....	7	7
DEFINITIONS.....	8	7
REFERENCES.....	9	8

1. PURPOSE. The purpose of this procedure is to establish a uniform method of reporting errors or omissions discovered in the Offerors' proposals and for requesting clarification when such information is essential for conducting the evaluation.

2. SCOPE. Applicable to all Source Selection Evaluation Board (SSEB) personnel, advisors, and consultants.

3. GENERAL.

a. In reviewing an Offeror's proposal, evaluators of the SSEB may encounter errors or omissions in varying degrees of substance. Some are superficial and easily correctable while others are more significant. Clarification may be required prior to completing the evaluation of a subfactor or factor.

b. EOC reports collected by this procedure are intended for transmittal to the Contracting Officer (KO) for further dispatch to the responsible Offeror.

4. POLICY.

a. All errors, omissions or clarifications identified shall be described and reported through the Chairman and/or Deputy Chairman of the SSEB to the KO.

b. Separate EOC report logs will be maintained for each Offeror.

5. RESPONSIBILITIES.

a. Evaluators, Advisors and Consultants.

BOP NO. 12

(1) Complete reports of error, omission, or clarification on the EOC Report Form (See Appendix A) for each Offeror following the member's review of that Offeror's proposals.

(2) Internally coordinate EOC reports at their respective SSEB management level as required.

(3) Review and correct, as required, typed ORIGINAL of EOC report.

(4) Sign the signature COPY of the typed ORIGINAL prior to starting the formal review process.

(5) Review Offeror's response to each EOC report as to the adequacy of response.

b. Area Chiefs, Element and Factor Leaders.

(1) Review and validate EOC reports on the signature COPY prior to submission to the SSEB Chairman.

(2) Internally coordinate EOC reports at their respective SSEB management level as required.

(3) Originating Area Chiefs, Element and Factor Leaders will review Offeror's response prior to distributing the response, through the SSEB organizational structure, to the EOC report originator.

(4) Other Area Chiefs, Element and Factor Leaders will review each response to each EOC report for possible impact on their assigned areas of evaluation.

c. Area Secretary.

(1) Assign Area portion of Board Control Number following review and initialing of the signature COPY by the Area Chiefs (See Appendix B).

(2) Fill in Area portion of Board Control Number on all parts of the EOC report package.

(3) Complete the lower right hand "Date" block on the signature COPY of the EOC report.

(4) Reproduce three copies of the signed and initialed signature copy.

(5) Prepare EOC report package to be forwarded to the SSEB Chairman.

(6) Distribute or file copies of the EOC report as they progress through the SSEB approval cycle.

(7) After the Area Chief has reviewed each Offeror's response to EOC report, file one copy in Area master EOC report response file and forward one copy to the originating Element Leader.

BOP NO. 12

d. Board Chairman.

- (1) Reviews and approves or rejects EOC reports.
- (2) Authorizes transmittal of EOC report to the KO.
- (3) Provides information to the Executive Officer for completing Memo Routing Slip.
- (4) Reviews responses to EOC report prior to Executive Officer filing response.
- (5) Renders dispositions on all EOC reports that have potential contractual or legal problems.

e. Executive Officer.

- (1) Assigns the Board portion of the Board Control Number to the EOC report following approval for release by SSEB Chairman (See Appendix B).
- (2) Complete the upper right hand "Date" block on all copies of the EOC report package.
- (3) Fill in Board portion of Board Control number on all parts of the EOC report package.
- (4) Fill in the known information in the SSEB masterlog for each EOC report (See Appendix C).
- (5) Complete the Memo Routing Slip for transferring EOC package to KO (See Appendix D).
- (6) File the signature COPY in the Board master EOC file.
- (7) Forward each EOC report package along with the Memo Routing Slip to the KO.
- (8) Fill in necessary information in the SSEB master log for each EOC report response, when received from KO.
- (9) File each EOC report response following review of SSEB Chairman.

f. Contracting Officer or Contracting Officer Representative.

- (1) Reviews, with assistance of SSEB legal counsel, all EOC reports for potential contractual and legal problems.
- (2) Assigns a suspense date and transmits EOC report to the affected Offeror in accordance with Memo Routing Slip from the Executive Secretary.
- (3) Reproduce one copy of the signature COPY which contains all SSEB information (originator, initials, Board Control Number and date).
- (4) File copy of signature COPY in master KO file.

BOP NO. 12

(5) Fill in known information in the KO disposition log sheets for each EOC report for the respective Offeror.

(6) Return the signature COPY to the originating Area's Secretary.

(7) Receives all EOC report responses from Offerors.

(8) Followup with Offeror on any EOC report responses which have exceeded the suspense date.

(9) Fill in the necessary information of the KO disposition log sheet for each EOC report response.

(10) Make seven copies of each EOC report response.

(11) Distribute EOC report responses.

g. Legal Counsel. Assist the KO, as required, during the review of each EOC report.

6. PROCEDURES.

a. Each Board member will, as a result of a review of an Offeror's proposal, prepare and sign a handwritten EOC report of each error, omission, or clarification, or other questionable area discovered. This is the first action in preparing an EOC report package.

b. The handwritten EOC report is submitted to the typing pool for typing (original and one copy). The evaluator's name and area will be typed on the signature COPY only by the Area Secretary.

c. The typed ORIGINAL, signature COPY, and handwritten copy will be returned to the originating Board member for review and proofing. If the typed original of the EOC report is found to need correction, the signature COPY will be corrected in red pencil or ink (DO NOT cut and tape) and returned for retyping to the pool. The process of reviewing and proofing will continue until the originating member is satisfied with the typed EOC report. Once the originating Board member is satisfied with the typed EOC report, the originating Board member will sign the signature COPY in the "prepared by" block of the EOC report, not the ORIGINAL typed EOC. The EOC report package, now consisting of the typed ORIGINAL and signature COPY will be forwarded to the next level for review/validation.

d. The Factor Leaders, Element Leaders and Area Chiefs will then review/validate the EOC report and initial the signature COPY in the "approved by" block, not on the ORIGINAL typed EOC report. The EOC report package then returned to the Area Secretary for assignment of the Area portion of the Board Control Number (See Appendix B), make the proper entry in the Area log and type the Area portion of the Board Control Number on all portions of the EOC report package in the "Board Control No." block.

e. The Area Secretary, after assigning the Area portion of the Board Control Number, will complete the "date" block on the signature COPY. Three copies of the signed, numbered and dated signature COPY will be reproduced by

BOP NO. 12

the Area Secretary. These reproduced copies are distributed or filed as follows:

- (1) ORIGINAL typed copy - SSEB Chairman *
- (2) Signature COPY - SSEB Chairman **
- (3) Reproduced copy No. 1 - SSEB Chairman ***
- (4) Reproduced copy No. 2 - Temporary Area File ***
- (5) Reproduced copy No. 3 - Return to Originator ***

NOTE: * No information is contained in the "Prepared By", "Approved By", "Area", and "Date" blocks at bottom of the EOC report.

** All information blocks at bottom of EOC report are complete.

*** Copy of signature COPY.

f. At this point the EOC report package consists of the ORIGINAL typed copy, signature COPY, and a reproduced copy. The EOC report package is then forwarded to the SSEB Chairman for review and authorization for transmittal to the KO.

g. The Executive Officer will, after receiving authority to transmit to the KO, accomplish the following.

(1) Assign the Board portion of the Board Control Number to the EOC report package (See Appendix B).

(2) Type the Board portion of the Board Control Number on each copy of the EOC report package.

(3) Assign the date to each copy of the EOC report package in the "date" block at the top of the page (See Appendix A).

(4) Make the proper entry into the Board EOC log (See Appendix C).

(5) File the copy of the signature COPY in the Board EOC report file for the respective Offeror.

(6) Prepare a Memo Routing Slip in accordance with the SSEB Chairman's guidance (See Appendix D) and forward the EOC report package to the KO.

h. The KO will perform the following prior to distributing the ORIGINAL typed copy and the signature copy.

(1) Reproduce one copy of the signature COPY for the master KO file.

(2) Mail the typed ORIGINAL along with the transmittal letter that reflects the SSEB Chairman's guidance on the Memo Routing Slip to the respective Offeror.

BOP NO. 12

(3) Inform the Executive Officer of transmittal date of EOC for recording in Board EOC log.

(4) Return the signature COPY to the originating Area's Secretary.

i. The originating Area Secretary will then perform the following:

(1) Fill in the Board portion of the Board Control Number on the reproduced copy that is in the temporary Area file.

(2) Return the reproduced copy with total Board Control Number to the originating Element Leader.

(3) Complete the Area log sheet for the respective EOC report.

(4) File the signature COPY in the Area master EOC file for the respective Offeror.

j. The Element Leader will return, through the Factor Leader, the reproduced copy to the originator.

k. The KO, upon receipt of response to each EOC report, will make seven copies and forward them as follows:

(1) One copy to the Board Chairman.

(2) Two copies to the originating Area Chief.

(3) One copy to each of the other Area Chiefs. NOTE: Cost EOC responses will not be forwarded to the other Area Chiefs.

l. The originating Area Chief will maintain one copy of the EOC response to be filed in the Area master log by the Area Secretary. The other EOC report response to the originating Area Chief will be forwarded back through the Area organization to the originator.

m. The Area Secretary will complete the response portion of the EOC report log for the originating area.

n. The SSEB Chairman will review the response and then forward the response to the Executive Officer for filing and completion of the Board master log sheet.

o. Each other Area Chief will review each EOC report in the KO master response file.

p. The KO will file the master response to the EOC report in the KO master response file.

NOTE: It is essential that the EOC report process be expedited. All reviewers of EOC reports should make a special effort to expedite the reviewing process. The Executive Officer must complete the assignment of Board Control Numbers on at least a daily basis.

BOP NO. 12

7. INTERNAL COORDINATION. In many cases EOC reports, when being prepared, will have the potential of affecting an evaluation that is being conducted in another area of the SSEB. Therefore, all Board members are encouraged to coordinate EOC reports at their respective SSEB organization levels (i.e., Subfactor member to Subfactor member within a Factor, Factor Leader to Factor Leader within an Element, Element Leader to Element Leader within an Area, Area Chief to Area Chief within the SSEB management structure).

8. DEFINITIONS.

a. ERROR NOTICE--a notice that a mistake in a calculation or measurement, or typographical error or misprint has been made.

b. OMISSION NOTICE--a notice of the failure to respond to a requirement stated in the Request for Proposal (RFP).

c. CLARIFICATION NOTICE--a notification that the data requested by the RFP and needed for evaluation required clarification.

d. OTHER--will apply when the item that the evaluator needs to complete his evaluation does not lend itself to the three categories above.

9. REFERENCES. AMCP 715-3.

Chairman
XYZ System
Source Selection Evaluation Board

XYZ SYSTEM - EVALUATION
REPORT OF ERROR, OMISSION, OR CLARIFICATION (EOC)

CONTRACTOR _____	BOARD CONTROL NO. _____	DATE _____
ERROR _____	OMISSION _____	CLARIFICATION _____
		OTHER _____
CONTRACTOR PROPOSAL-VOLUME _____	PAGE _____	PARA _____
	PAGE _____	PARA _____
REF RFP _____	ATTACH _____	PAGE _____
		PAGE _____
SUBJECT: _____		
DISCUSSION		

SHEET ____ OF ____

PREPARED BY _____ APPROVED BY _____
AREA _____ AREA CONTROL NO. _____ DATE _____

Appendix A to BOP 12

EOC BOARD CONTROL NUMBER

1. The originating Area Secretary will assign the Area portion of and the Executive Secretary will assign the Board portion of the Board Control Number for each EOC report.

2. The following Board Control Numbering method will be utilized:

W-XXXX-ZZZ

Board Portion of Board Control Number: . ZZZ

Area Portion of Board Control Number: W-XXXX

Where:

W is the identifying letter of the Offeror's name, A for Company A, B for Company B, and C for Company C.

X is the identifying letter for the originating SSEB Area of the EOC report:

T - Technical
R - RAM/ILS
P - Production Competition
C - Cost
M - Management
B - SSEB

YYY is the sequence number for the originating Area. There will be a separate set of sequence numbers for each Offeror.

ZZZ is the sequence number for the Board. There will be a separate set of sequence numbers for each Offeror.

3. All official reference to an EOC report shall be by this single Board Control Number.

EXAMPLE

A-T001-005	The fifth EOC report going to Company A was the first EOC report from the Technical Area.
B-R005-010	The tenth EOC report going to Company B was the fifth EOC report from the RAM/ILS Area.
C-M014-020	The twentieth EOC report going to Company C was the fourteenth EOC report from the Management Area.

APPENDIX B TO BOP 12

APPENDIX C TO BOP 12

ROUTING AND TRANSMITTAL SLIP			Date
TO: (Name, office symbol, room number, building, Agency/Post) XYZ SYSTEM SSEB		Initials	Date
1. Contracting Officer			
2.			
3.			
4.			
5.			
Action	File	Note and Return	
Approval	For Clearance	Per Conversation	
As Requested	For Correction	Prepare Reply	
Circulate	For Your Information	See Me	
Comment	Investigate	Signature	
Coordination	Justify		

REMARKS

1. Reference Offeror Proposal from _____.
2. Attached are Reports of Error, Omission, or Clarification (EOC), Sequence Numbers _____ thru _____.
3. Expeditious processing and response time from the Offeror is requested. A reply within five (5) days or less would be appreciated.

DO NOT use this form as a RECORD of approvals, concurrences, disposals, clearances, and similar actions

FROM: (Name, org. symbol, Agency/Post) Executive Officer	Room No.—Bldg. Phone No.
--	---------------------------------

5041-102
☆ U.S. G.P.O. 1983-414-517

OPTIONAL FORM 41 (Rev. 7-76)
Prescribed by GSA
FPMR (41 CFR) 101-11.206

XYZ SYSTEM SOURCE SELECTION EVALUATION BOARD
ABC COMMAND

BOARD OPERATING
PROCEDURE No. 13

AMENDMENTS TO REQUEST FOR PROPOSAL (RFP)

	PARA	PAGE
PURPOSE.....	1	1
SCOPE.....	2	1
RESPONSIBILITIES.....	3	1
PROCEDURES.....	4	1

1. PURPOSE. The purpose of this procedure is to establish a uniform method to amend the RFP for the XYZ System subsequent to original proposal submittal date.

2. SCOPE. Applicable to all Source Selection Evaluation Board (SSEB) personnel, advisors, consultants and the XYZ System Project Manager (XYZ).

3. RESPONSIBILITIES.

a. Evaluators. Prepare request for RFP amendment on a Disposition Form (DF) (Appendix A) through Area Chiefs, Chairman, SSEB to Contracting Officer (KO).

b. Area Chiefs. Concur/Non-Concur in request for change.

c. Chairman. Concur/Non-Concur in request for change from SSEB and coordinate changes initiated by the XYZ PM.

d. XYZ PM. Concur/Non-Concur in request for change from SSEB. May also initiate changes as necessary, not as a result of SSEB evaluation.

e. Contracting Officer. The KO will incorporate the change(s) into an amendment to the RFP, coordinate the amendment with each Area Chief, Chairman and Legal advisor. The final coordinated amendment will be forwarded to each Offeror and to other elements as required.

4. PROCEDURES.

a. The evaluator will submit the change(s), adequately defined for incorporation into the RFP.

b. The Area Chief will review the change(s) to insure its technical adequacy and validity and insure coordination with XYZ PM.

c. The XYZ PM will submit independently developed changes to the KO for incorporation into the RFP (following coordination with the SSEB).

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BOP NO. 13

d. SSEB Chairman will review and approve the change(s) and forward them to the KO.

e. The KO will incorporate the changes(s) to the RFP by amendment and furnish each Offeror copies of amendment and make distribution of amendments to the other elements as required.

Chairman
XYZ System
Source Selection Evaluation Board

XYZ SYSTEM SOURCE SELECTION EVALUATION BOARD
ABC COMMAND

BOARD OPERATING
PROCEDURE NO. 14

"EYES ONLY"/BACK CHANNEL MESSAGES

	PARA	PAGE
PURPOSE.....	1	1
SCOPE.....	2	1
DEFINITION.....	3	1
GENERAL.....	4	1
RESPONSIBILITIES.....	5	2
PROCEDURES.....	6	2

1. PURPOSE. To establish policy, provide necessary guidance and delineate responsibilities and procedures to insure efficient processing of "Eyes Only"/Back Channel Messages for the Chairman, Source Selection Evaluation Board (SSEB).

2. SCOPE. Applicable to all SSEB personnel, advisors and consultants.

3. DEFINITIONS.

a. Privacy Communications System: Messages which are sensitive or private in nature, originated by senior DoD military and civilian officials, and transmitted via the Defense Special Security Communications System/AUTODIN (DSSCS/DIN). These messages are normally dispatched and received via the Defense Special Security Officer (SSO) System.

b. Authorized User: US General/flag officers, officers grade O6 in a promotable status and DoD civilian officials of rank equivalent to General/flag officer or senior rank are authorized the use of the Privacy Communications System by virtue of their rank/position. Army officers in grade below general officer may use the Privacy Communications System when so authorized by the Chief of Staff, Army or the Vice Chief of Staff, Army through the Director of the Army Staff, HQDA.

c. "Eyes Only" Message: A message addressed from one official to another by name, position/title, and location which is processed via the Privacy Communications System. Such messages are also referred to as "EO" or "Back Channel" messages.

4. GENERAL.

a. "Eyes Only" Messages will be given top priority handling in accordance with procedures for handling sensitive material.

BOP NO. 14

of the Freedom of Information Act, privacy communications cannot be categorically exempted from release to the public solely because of the sensitive nature of the message system. The standards of denial which apply to other forms of intra-agency communications apply to privacy communications.

5. RESPONSIBILITIES.

a. The Special Security Officer (SSO). The ABC Command is responsible for the transmission of all incoming and outgoing "Eyes Only" Messages.

b. The Executive Officer is responsible for controlling all incoming and outgoing messages for the Chairman, as they are received from the SSO or sent to them for transmission.

6. PROCEDURES.

a. Incoming "Eyes Only" Messages. Incoming "Eyes Only" Messages are received by the Executive Officer from the SSO. Messages are conveyed in sealed opaque envelopes marked "BACK CHANNEL/EYES ONLY TO BE OPENED BY" (Intended recipient's grade and name). Messages are logged into the Executive Office and forwarded to the addressee. The Chairman indicates action to be taken, if any, and designates an action officer. No distribution will be made beyond that authorized by the Chairman. The Executive Officer will disseminate the "Eyes Only" message to the appropriate personnel when so instructed and annotate the log book.

b. Outgoing "Eyes Only" Messages. Outgoing "Eyes Only" Messages will be typed using the Red Bordered DD Form 173, Joint Message Form. An original and two tissue carbon copies, double spaced, will be prepared (See Appendix A). The message will be routed through the Executive Officer to the Chairman for signature. All outgoing "Eyes Only" messages will be authenticated for release by the personal signature or initials of the authorized user (originator). After signature/release, the message is logged out of the Executive Office and handcarried to the SSO, ABC Command for dispatch. One copy will be retained in the Executive Office.

c. Distribution. Original message is forwarded by SSO for the addressee and SSO maintains one carbon copy for record files. Further distribution or copies furnished will be determined by the Chairman only.

d. Classified Messages. Classified "Eyes Only" Messages will be handled in same manner and in accordance with Security Regulations.

Chairman
XYZ System
Source Selection Evaluation Board

UNCLAS

01 01 LEAVE REMAINDER OF BLOCK BLANK

SSO ABC COMMAND

SSO AMC

(NOTE: MAXIMUM RIGHT HAND MARGIN IS 68. I SET MINE AT 65 SO THAT I AM CERTAIN NOT TO TYPE BEYOND 68. I USE PRESTIGE ELITE 12, TYPING IN ALL CAPS.)

UNCLAS F O U O COMPLETION SENSITIVE EYES ONLY STL

EYES ONLY//EYES ONLY//EYES ONLY//EYES ONLY//EYES (NOTE: EYES ONLY//IS TYPED FROM LEFT MARGIN TO RIGHT MARGIN OF 68)

SSO AMC FOR _____, CHIEF OF STAFF
FROM _____, CDR ABC COMMAND
SUBJ

1. TEXT.
 2. AFTER TYPING YOUR TEXT, BE SURE TO ADD THE FOLLOWING PARAGRAPHS.
 3. ALL INFORMATION RELATED TO THE SUBJECT MUST BE TREATED AS HOLD CLOSE AND COMPLETION SENSITIVE.
 4. ABC COMMAND - PROVIDING LEADERS THE DECISIVE EDGE.
 5. WARM REGARDS. (THIS IS ALWAYS THE LAST PARAGRAPH)
- SSO NOTE DELIVERY DURING NORMAL DUTY HOURS.

GENERAL, USA
COMMANDING

(NOTE: INSERT THE
PROPER SIGNATURE
BLOCK OF DRAFTER

NOTE: THIS IS ALWAYS THE SIGNATURE
BLOCK FOR BACK CHANNEL MESSAGES
REGARDLESS OF WHO DRAFTED IT.

Appendix A to BOP 14

XYZ SYSTEM SOURCE SELECTION EVALUATION BOARD
ABC COMMAND

BOARD OPERATING
PROCEDURE NO. 15

LESSONS LEARNED REPORTS

	PARA	PAGE
PURPOSE.....	1	1
SCOPE.....	2	1
POLICY.....	3	1
RESPONSIBILITIES.....	5	2

1. PURPOSE. The purpose of this procedure is to establish control for preparation of Lessons Learned Reports.

2. SCOPE. Applicable to all Source Selection Evaluation Board (SSEB) personnel, advisors, and consultants.

3. POLICY. Regulations and policy and procedure documents concerned with the New Materiel Acquisition Guidelines requires that problems and solutions encountered during the course of the SSEB of the XYZ System be recorded and submitted as a Report of Lessons Learned to the Commander, US Army Materiel Command (USAMC).

4. RESPONSIBILITIES.

a. Evaluators and Advisors. Utilize the "Lessons Learned Report" form (Appendix A) to prepare comments and recommendations. Submit the form (single typed copy) through the Area Chief to the Executive Officer. Each lesson should be prepared showing:

(1) Subject - the subject of the problem area in a single word, phrase or sentence.

(2) Lesson Learned or Problem - concise statement of the circumstances involved and the impact upon the source selection activity.

(3) Suggestion/Solution - means by which the problem may be resolved in future source selection actions.

b. Area Chiefs.

(1) Review the report(s) submitted, add comments, if desired, prepare overall report(s) from an Area standpoint.

(2) Forward individual Lessons Learned Reports to the Executive Officer in a timely manner.

BOP NO. 15

(3) Keep a running account of the Lessons Learned Reports from his Area during the course of the Board operations.

(4) Analyze the Lessons Learned from his Area and develop recommendations to improve the source selection process and furnish these to the Executive Officer of the SSEB.

c. Executive Officer.

(1) Forward appropriate Lessons Learned to the Source Selection Advisory Council (SSAC) administrative assistant as they are received.

(2) Maintain official Board file of Lessons Learned.

(3) Within 30 calendar days after contract award, forward a consolidated report of the Lessons Learned and resulting recommendations to USAMC, ATTN: AMCPP-SP. The Lessons Learned Report will be an annex to the SSEB Final Report.

Chairman
XYZ System
Source Selection Evaluation Board

XYZ SYSTEM SSEB
LESSONS LEARNED

PERTAINS TO THE: ☐ Evaluation ☐ RFP/LOI ☐ Other

SUBJECT:

LESSONS LEARNED OR PROBLEM:

SUGGESTED SOLUTION:

SUBMITTED BY _____ AREA _____

APPENDIX A TO BOP 15

XYZ SYSTEM SOURCE SELECTION EVALUATION BOARD
ABC COMMAND

BOARD OPERATING
PROCEDURE NO. 16

DEPARTURE CLEARANCE PROCEDURES

	PARA	PAGE
PURPOSE.....	1	1
SCOPE.....	2	1
RESPONSIBILITIES.....	3	1
DEFINITIONS.....	4	1
PROCEDURES.....	5	2

1. PURPOSE. The purpose of this procedure is to provide guidance for processing personnel departing the Source Selection Evaluation Board (SSEB).

2. SCOPE. Applicable to all SSEB personnel, advisors, and consultants.

3. RESPONSIBILITIES.

a. Area Chiefs, with the approval of the Chairman, will release subordinate personnel as appropriate.

b. Individuals of the SSEB intending to depart the SSEB permanently or temporarily are responsible for providing appropriate information to Area Chiefs and are required to accomplish actions necessary for departure clearance. All out-of-town personnel will submit two copies of paid travel vouchers to the XYZ System PMO as soon as possible upon return to home station.

4. DEFINITIONS.

a. Departure Clearance Check. A list of actions to be completed by individuals prior to departure.

b. Sensitive Material. All Unclassified, Sensitive, or For Official Use Only material (quotations, reports, correspondence, procedures, diagrams, etc.) contained in proposals or originating with the Board that has anything to do with the operation or end result of this Board.

c. Classified Material. Any documents or working papers classified CONFIDENTIAL or SECRET.

d. Permanent Departure. Individuals departing on a permanent basis and will not return.

e. Temporary Departure. Individuals departing the ABC Command area on a temporary basis and will be gone more than one working day on official business but will return prior to cessation of evaluation program.

BOP NO. 16

5. PROCEDURES. As individuals are released by their Area Chiefs or the SSEB Chairman (temporarily or permanently, they will sign a Debriefing Statement and complete actions listed on the SSEB Departure Check List (Appendix A). A copy of the check list may be obtained from the Security Officer or Receptionist.

Chairman
XYZ System
Source Selection Evaluation Board

SSEB DEPARTURE CHECK LIST (Temporary & Permanent)

All individuals departing temporarily or permanently will complete actions listed below. If individual is departing temporarily and plans to return, he will complete items marked with an asterisk (*). All items, including items marked with an asterisk, will be completed for permanent departure.

AREA

- * 1. Cleared by Area Chief (Area Chief's Initials)
- 2. Desk emptied (turn supplies in to the Special Assistant for Administration and Support)
- * 3. Time attendance sheet posted.
- 4. All working papers turned in to Area Chief.
- 5. Transportation and reservations completed.
- * 6. Secured Offeror's Proposals in file cabinet.

ADMINISTRATIVE AREA

- 1. Check hand receipt documents.
- 2. Received copy of amendments to travel orders.
- 3. Debriefing Statement signed.
- * 4. SECRET material turned in.
- * 5. Temporary car sticker turned in.
- * 6. Badge turned in.

NAME

AREA

APPENDIX to BOP 16

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Appendix V

T800 Evaluation, Factor Sheet, Factor/Element Worksheet

PROPOSAL

AREA

ELEMENT

FACTOR

SUBFACTOR

SCORE

PARA

PARA

PARA

PARA

EVALUATOR'S JUSTIFICATION

1. FINDING: Brief description supporting the score using the narrative presented in Exhibit 2 for each score.
2. STRONG POINTS: Brief (one or two sentence) summary of all strong points that contributed to the final score. If none, so state.
3. WEAK POINTS: Brief (one or two sentence) summary of all weak points that contributed to the final score. If none, so state.
4. GREEN FLAGS: Brief (one or two sentence) summary of all green flags. If none, so state.
5. RED FLAGS: Brief (one or two sentence) summary of all red flags. If none, so state.
6. NARRATIVE: Detailed description of the finding discussing in more depth all weak points, strong points, and flags.
7. RISK: Qualitative assessment of the risk (low, medium, high, very high) of the Offeror achieving the SSEB findings.

SHEET ____ OF ____

PREPARED BY _____ REVIEWED _____ DATE _____

Appendix W

T800 Evaluation Subfactor Sheet, Subfactor Worksheet

PROPOSAL	SCORE
AREA	PARA
ELEMENT	PARA
FACTOR	PARA
SUBFACTOR	PARA

EVALUATOR'S JUSTIFICATION

1. FINDING: Brief description supporting the score using the narrative presented in Exhibit 2 for each score.
2. STRONG POINTS: Brief (one or two sentence) summary of all strongpoints that contributed to the final score. If none, so state.
3. WEAK POINTS: Brief (one or two sentence) summary of all weak points that contributed to the final score. If none, so state.
4. GREEN FLAGS: Brief (one or two sentence) summary of all green flags. If none, so state.
5. RED FLAGS: Brief (one or two sentence) summary of all red flags. If none, so state.
6. NARRATIVE: Detailed description of the finding discussing in more depth all weak points, strong points, and flags.
7. RISK: Qualitative assessment of the risk (low, medium, high, very high) of the Offeror achieving the SSEB findings.

SHEET ____ OF ____

PREPARED BY _____ REVIEWED _____ DATE _____

Appendix X

T800 Evaluation, Evaluation Sheet Definitions

AREA - The second level of the evaluation structure.

ELEMENT - The third level of the evaluation structure.

FACTOR - The fourth level of the evaluation structure.

SUBFACTOR - The fifth level of the evaluation structure.

CODE - A number assigned to each level of the evaluation structure for identification purposes.

EVALUATOR - An individual board member for evaluating assigned portions of the proposals and assigning appropriate scores with justification.

ENDORSER - An individual at the next higher level above the evaluator who is responsible for a detailed check on the Evaluator's Work Sheet.

GREEN FLAG - A specific item that exceeds RFP requirements and will result in improved benefits to the Government in cost, schedule, or performance.

RED FLAG - A specific item that reflects inadequacies or omissions that preclude meeting program objectives and has had a detrimental impact on cost, schedule, or performance.

STRONG POINTS - A specific item that exceeds RFP requirements and enhances the probability of program success.

WEAK POINTS - A specific item that reflects inadequacies or omissions that may be corrected through clarification, discussion or negotiation.

Appendix Y
Contractor Performance Evaluation Program

DEPARTMENT OF THE AIR FORCE
Headquarters Electronic Systems Division (AFSC)
Hanscom Air Force Base, MA 01731

ESD REGULATION 178-1
1 Sep 83

Management Analysis

CONTRACTOR PERFORMANCE EVALUATION PROGRAM (CPEP)

This regulation establishes policy, procedure, and responsibility for standardizing evaluations of contractor past performance and storage of such information. It applies to the Mission Deputies at the Electronic Systems Division (ESD), i.e., the Deputy for Mission Support Systems (ESD/OC), the Deputy for TAC Systems (ESD/TC), the Deputy of Strategic Systems (ESD/SC), the Deputy for Airborne Warning and Control Systems (AWACS) (ESD/YW), the Deputy for Development Plans (ESD/XR), the Deputy for Technical Operations and Product Assurance (ESD/AL), the Deputy for C Countermeasures (ESD/EC), the contracting directorates within the Deputy for Contracting (ESD/PK), the Air Force Geophysics Laboratory (AFGL), Electromagnetic Science Division (RADC/EE) and Solid State Science Division (RADC/ES). This regulation does not apply to the offices of the Directorate of Base Contracts (ESD/PKU) or the Directorate of FCRC Support (ESD/ALF); although it may be used as a guide. It applies to all active Research/Development and Systems Contracts.

1. General:

This regulation establishes procedures to evaluate contractor performance and to ensure historical documentation is recorded and information maintained in a central ESD/PKP repository. This data will be used by:

(1) The designated Source Selection Authority under AFR 70-15 and AFSCR 80-15 as amended.

(2) Contracting Officers who need information to determine responsibility of a prospective contractor before award of a contract which does not require use of formal source selection procedures. All ESD research/development and systems contracts are involved in this evaluation review regardless of dollar value.

2. Procedures:

a. The responsible Program/Project Manager and the assigned Procuring Contracting Officer (PCO) will jointly initiate, accumulate and evaluate contractor performance information according to the Contractor Performance Evaluation Program (CPEP). An original and five copies of "Contractor's Performance Evaluation Report for R&D and Systems Contracts", ESD Form 64, and a supporting narration will be prepared and signed by the Program/Project

Supersedes ESDR 178-1, 27 Feb 1981
No. of Printed Pages: 12
OPR: ESD/PKP (J.A. Spirito)
Approved by: R.J. Bowes
Editor: S.C. Lima
DISTRIBUTION: F, X:

Manager and the PCO for each assigned R&D and/or Systems contract. The responsible mission deputy or corresponding Laboratory Director and contracting director will review the evaluation report before it is released. The original copy will be part of the official contract file and one copy will be sent to ESD/PKP for the ESD contract performance data bank. The second copy will be retained by the Program/Project Manager. The third copy will be sent to the Directorate of Cost Analysis (ESD/ACC) data bank. The fourth copy will be sent to ESD/BC, the fifth copy will be sent to the contractor.

b. The Program/Project Manager and PCO will prepare an initial evaluation report one hundred eighty calendar days after contract award. Interim reports will be prepared every one hundred eighty calendar days thereafter until the contract is either physically complete or completely terminated. The final report will be prepared when the contract is physically complete. This will be a "stand alone" document covering the entire period of performance. All interim and final reports will be furnished the contractor by the PCO. Each report will be prepared and submitted no later than fifteen calendar days after each reporting period. In preparing such reports, information may be requested from any functional discipline involved in the program, e.g., Logistics, Manufacturing, Engineering, Contracting, etc.

c. For R&D, study, and support contracts not supporting systems acquisitions where the total obligated amount is \$1 million or less, only a final report at contract completion will be required.

d. Research and Development (ESD/PKR) contracts \$1M or less and contracts that are limited to studies or support will be reported once at the time of completion (as a final report). Distribution will be accomplished as stated in paragraph 2.a. (This one time reporting does not apply to contracts supporting systems acquisitions. Contracts supporting systems acquisitions, regardless of dollar value will require interim reports.)

e. The PCO will ensure copies of all CPEP correspondence to and from the contractor are made part of the evaluation report submitted to PKP for the ESD/PKP contract performance data bank.

3. Responsibility:

a. ESD/PK has designated ESD/PKP as OPR to establish the Contractor Performance Evaluation Program (CPEP) and for assuring the accumulation and storage of historical data necessary for the source selection process. The following will apply:

(1) Each cognizant contracting office will ensure all R&D and Systems contracts have recorded data on contractor performance required by this regulation.

(2) ESD/PKP will interface with all cognizant and involved deputies (Program/Project Managers) and PCOs to ensure timely completion of reports required by this regulation.

(3) The Source Selection Secretariat (ESD/PKP-2) will maintain a repository to store accumulated contractor historical information. Such

information will be issued, on request, to authorized Government personnel involved in the formal source selection process who have a "need to know". Information will also be provided to PCOs who are conducting competitive acquisitions not under the formal procedures of AFR 70-15 or AFSCR 80-15.

(4) Active as well as physically complete contracts will be reviewed at the yearly in-house ESD/PK Staff Survey Review to ensure appropriate recordings have been made, per contract, for each contractor's performance effort.

(5) The Contract Closeout Group (ESD/PKP-3) will not accept a physically complete contract without the required final ESD Form 64 and accompanying documentation.

(6) The PCO will ensure that complete evaluation reports with narrative inputs of the Administration Office and the Administrative Contracting Officer (ACO), contractor's responses (if any), etc., are sent to the Source Selection Secretariat (ESD/PKP-2) immediately after coordination by the mission deputy and contracting director.

b. Line Functional Directors/Deputies, e.g., Manufacturing, Quality Assurance, Engineering, Logistics Contracting, etc., will ensure formal requests for CPEP information are answered promptly with complete inputs.

c. Disagreements on any aspects of the evaluation performed will be resolved at the Deputy level. Formal resolution will be accomplished as quickly as possible.

4. Records Disposition:

a. Documents accumulated as a result of this regulation will be disposed of under AFM 12-50, Table 70-1 Rule 2.

b. Requests for information under the Freedom of Information Act (FOIA) for data compiled by implementing this regulation will be treated on a case-by-case basis.

Forms prescribed: ESD Form 64

OFFICIAL

151
WALTER P. BUCK, III, Major, USAF
Director of Administration

JAMES W. STANSBERRY
Lieutenant General, USAF
Commander

- 2 Atchs
1. Instructions for Preparation of ESD Form 64
 2. Reporting Guide/Checklist

Summary of Changes:

This revision updates the existing regulation and adds to the reporting requirements that:

- (1) Copies of all evaluation reports be provided to affected contractors and to ESD/BC;
- (2) Engineering support contracts which previously required only a final report, regardless of dollar value, now require interim reports if in excess of \$1M; and
- (3) Onetime reporting for R&D and development contracts and contracts limited to studies, regardless of dollar value, will require interim reports if they support systems acquisitions.

CONTRACTOR PERFORMANCE EVALUATION PROGRAM (CPEP)

Instructions for Preparation of ESD Form 64

1. An objective evaluation of contractor performance will be made periodically by the Program/Project Manager (PM) and the PCO responsible for managing or monitoring a particular contract. Facts to support specific areas of evaluation should be obtained from Government specialists familiar with the contractor/s performance on the particular contract reviewed. The overall evaluation will be that of the PM and PCO, and will be submitted to the mission deputy and contracting director for review before it is released. ESD Form 64 will be used and submitted according to the following schedule: (This schedule may be modified by agreement between the PM and PCO when conditions or peculiarities of the contract so dictate.)

a. An initial evaluation report will be based on the first one hundred eighty calendar days of contract performance. (All reports will be prepared and submitted no later than fifteen calendar days after each reporting period.)

b. Interim reports will be submitted every one hundred eighty calendar days thereafter until the contract is either physically complete or completely terminated.

c. The final report will be submitted when the contract is physically complete or completely terminated. This will be a "stand alone" document covering the entire period of performance.

d. Research and Development contracts \$1 million or less and contracts that are limited to studies will be reported one time (as a final report). Contracts supporting systems acquisitions, regardless of dollar value, will require interim reports.

e. A final report only is required for R&D, Systems Contracts and contracts supporting systems acquisitions completed within one hundred eighty calendar days or less, from date of award (short duration contracts).

f. Copies of all evaluation reports will be provided to affected contractors, ESD/ACC and ESD/BC.

2. Attachment 2 is a guide and checklist to use when preparing the evaluation of contractor performance. Some of the objective questions requiring responses may not be applicable to a particular contract, or a specific time. In such cases, the Review Factor should indicate "not applicable" (N/A). The checklist/guide is tailored to a typical full-scale development and production contract. Contracts which are limited to studies, investigations, and reports should not be evaluated in terms of this checklist/guide. However, a report (final version) should be prepared using, but not limited to, factors such as quality, timeliness, and final cost of the contracted effort.

3. The questions for review of evaluation factors are designed to be answered "satisfactory" or "unsatisfactory", or "was" or "was not". However,

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Attachment 1

A1-2

additional explanatory phrases may also be used. Negative responses or unacceptable performance factors must be supported by facts. Contractor performance above that required by contract should be explained in terms of contractor motivation, tradeoffs, potential business, etc., as well as benefit to the Government. (All acceptable performance characteristics need not be expressed in minute-detail, however, concise and factual reasoning should form part of the accompanying narration.)

4. Questions have been categorized into the most common functional areas which a Program/Project Manager and Contracting Officer must frequently deal with. If there are redundancies in some areas and obvious omissions in others, evaluators should comment as appropriate for the particular program to ensure a more meaningful report.

5. All reports shall be marked "For Official Government/Contractor Use Only".

REPORTING GUIDE/CHECKLIST

ESD Form 64, Contractor's Performance Evaluation Report for R&D and Systems Contracts

Items 1 thru 7

Self-Explanatory

Item 8A

ENGINEERING/DESIGN AND TEST

1. If unsatisfactory explain problem(s) i.e., cost growth, schedule or technical inadequacies encountered.
2. Did contractor produced equipment meet contractual specification requirements? If not, state the conditions and/or performance not met, and the severity (impact).
3. Did the contractor provide adequate technical support to the Air Force tests programs, if applicable?
4. Did the contractor meet the established schedules for Preliminary Design Review (PDR), Critical Design Review (CDR), Development Test and Evaluation (DT&E), Functional Configuration Audit (FCA), Initial Operational Test and Evaluation (IOT&E), Physical Configuration Audit (PCA), Formal Qualifications Review (FQR), and the delivery schedule for hardware/software required for Government tests? Was the contractor adequately prepared for such services and audits when they did occur?
5. Was the contractor properly staffed (engineers and technicians) to do the design, development and test effort required by the contract?

Item 8B

CONFIGURATION MANAGEMENT

1. Were the specifications prepared by the contractor suitable for purposes intended? Were specifications suitably revised according to Government comments?
2. When required, were ECPs promptly submitted? Were ECPs complete and fully documented, including technical detail, SCNs, and pricing information?
3. Does the contractor have an adequate configuration control and accounting system? Is their management and surveillance over these areas sufficient?

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Attachment 2

A2-2

Item 8C

COST/FINANCIAL MANAGEMENT

1. Did the contractor experience cost growth on the contract?
 - a. If so, what were the causes?
 - b. Was the cost growth reported promptly?
 - c. Was the cost growth adequately explained and supported?
 - d. Did the contractor take appropriate action to prevent future cost growth?
2. Identify the number of cost growths, dollar amounts and reasons.
3. If contractor performance was impacted by financial difficulties, i.e., bankruptcy, difficulty in obtaining Government assistance; loans, etc., describe cause(s).
4. If the contractor experienced cost savings, briefly state reason(s).
5. Has the contractor provided adequate cost and scheduling performance reporting? Are revised "estimates to complete" realistic and submitted promptly?
6. Are the contractor's cost submissions realistic as they pertain to Engineering Change Proposals (ECPs) and Contract Change Notices (CCNs), etc?
7. Did the contractor have an underrun?
8. Describe earned incentive payments, award fee, etc., if applicable. (A negative response does not necessarily indicate that a low rating should be applied automatically.) Evaluate all factors including value engineering proposals, etc.

Item 8D

DATA MANAGEMENT

1. Is or was the data content acceptable and according to the CDRL? Were the following found acceptable?
 - a. Specifications
 - b. Plans
 - c. Procedures
 - d. Drawings
 - e. Technical Orders
 - f. Other

2. When necessary, is or was the contractor responsive to data corrections requested by the Government?

3. Were the deliveries made on time and were initial submissions acceptable? Evaluation should clarify whether contractor or Government were responsible for delay(s).

Item 8E

MANUFACTURING

1. Did the contractor adequately assess the producibility of the equipment that he developed or that which was specified? Was the contractor able to produce the specified hardware/software in a reasonable straight forward and acceptable manner?

2. Did the contractor's manufacturing plans address high risk areas, critical component lead times, rework procedures, etc?

3. Were the contractor's facilities, equipment and manning adequate to produce the goods required by the contract?

4. Were work measurements, process layouts, etc., adequate for the involved contractual effort?

5. Does the contractor have a capital investment program? Does it benefit the Government in any way? Did the contractor rely heavily on Government facilities?

6. Did the contractor participate in the Value Engineering Program? Were benefits derived by the Government?

7. Does the contractor have a productivity assurance program? Does it portray the Government's interest and concern?

Item 8F

QUALITY ASSURANCE/CONTROL

1. Did the contractor have an acceptable Quality Assurance Program? If so, did he fully comply with his QA Program?

2. Has the contractor considered the development of an analysis for demonstrating operational readiness?

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Attachment 2

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3. Did the contractor have adequate controls over the quality and timeliness of components produced by subcontractors and vendors?

Item 8G

LOGISTICS SUPPORT MANAGEMENT

Was the contractor successful in meeting the logistics program milestones, i.e., training spares, support equipment, technical orders, etc?

Items 8H and I

HARDWARE/SOFTWARE

1. If the contractor did not meet the contractual hardware or software requirements, give reasons.

2. Were the deliveries made on time and were initial submissions acceptable?

3. State reasons for delays and extensions to contract schedules or major milestones. Evaluation should clarify whether contractor or Government was responsible for delay(s).

NOTE: A good measure of a contractor's performance is the number of ECPs submitted during the development and production phases. During the development phase, compatibility changes normally submitted at no-cost do reflect incomplete design work. An understanding of what took place in the ECP submissions area should be ascertained. (State number and description of compatibility changes required to correct contractor deficiencies.)

Item 8J

RELIABILITY

1. Did the contractor have a reliability assurance program to ensure adequacy?

2. Were reliability goals established for each mode of system operation using contract requirements as a basis?

3. Were suitability objectives established for each subsystem of the development and were the objectives quantitatively defined in terms of MTBFs?

4. Were the reliability goals achieved?

Item 8K

MANAGEMENT

1. Were problems caused by turnover of key personnel? If so, what was the impact?

2. Was this program (contract) given the proper attention, or visibility, within the company organization?

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Attachment 2

A2-5

Item 8L

MAINTAINABILITY

1. Did the contractor have a maintainability plan which specified objectives for each stage of the system development?
2. Was the maintainability plan flexible enough to allow for modifications and improvements based on updated information?
3. Did the maintainability plan assure early production and ultimate formulation of a realistic and workable maintenance program which complied with the contractual requirements?
4. Were considerations for human factors made as an integral part of the design for maintainability.
5. Were the maintainability objectives achieved?

Item 8M

CONTRACTING

Did the contractor meet the terms and conditions set forth in the various sections of the basic contract or modifications/amendments thereto, i.e., Special Provisions, General Provisions, etc.? Explain with particulars.

Item 8N

OTHER AREAS OF PERFORMANCE

There may be several other evaluation factors which require explanation. Listed below are several common occurring situations which could impact upon contractor performance:

- a. Realism in risk assessment (financial, technical, and schedule)
- b. Ability to set and adhere to design tolerance.
- c. Ability to obtain the required system performance pursuant to the system specification requirements.
- d. Claim/Dispute.
- e. Receipt of "Cure Notice" or "Show Cause" Letter
- f. Termination - partial or complete. (Convenience or Default)

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Attachment 2

A2-6

g. Subcontract Management (adequacy and attainment of Small Business and Small Disadvantaged Business goals required by DAR 7-103 14(b) or (c) clause) and subcontract plan where applicable.

h. Consideration for life cycle cost and/or design-to-cost applications.

Item 9

TECHNICAL: If there were specification waivers or deviations or if the equipment did not meet the specifications, this block should be marked to signify that performance was not met in this area. A list of the deficiencies should be documented in the narration.

COST: If the contract is or was in a cost growth position, this block should be marked to signify performance was not met in this area. The amount and percentage of cost growth should be noted in the narration together with details re managerial ability to produce within target cost(s). (See Item 8C this attachment.)

SCHEDULE: If the contractor was delinquent in a contractual deliverable or a major milestone without an excusable delay, this block should be marked to signify performance was not met. Ensure the narrative has details re the delinquency, i.e., CLIN ITEM No., due date, actual delivery date and include the modification number which changed the delivery schedule requirement. (Specify if the schedule was subsequently adjusted for consideration or other reasons.)

Item 9A

RECOMMENDATIONS AND ADVICE (SUMMARY OF EVALUATION)

In summation of the entire evaluation, briefly express recommendation(s), comments, and advice to other Government personnel who are engaged in determining awardability for future acquisitions. Ensure factual and objective detail and conclusion.

Items 10 thru 13

Self-Explanatory

NOTE: For reporting purposes the definitions of "Cost Growth" and "Underrun" are as follows:

Cost Growth: Actual costs in excess of the estimated or target cost which are not related to Government directed changes in technical requirements and schedule (ECPs, etc.).

Underrun: Difference between actual costs and the final negotiated target or estimated costs (when actuals are less than target or estimated costs).

CONTRACTOR'S PERFORMANCE EVALUATION REPORT FOR R&D AND SYSTEMS CONTRACTS (Complete An Original Plus 5 Copies)

1. NAME/ADDRESS OF CONTRACTOR (Division) <input type="checkbox"/> SM BUS <input type="checkbox"/> S A <input type="checkbox"/> WM OWNED <input type="checkbox"/> LG BUS <input type="checkbox"/> NONPROFIT		2. REPORT NO. (Check box if report is final) <div style="text-align: right;"><input type="checkbox"/> FINAL</div>		
		3. CONTRACT NO. <input type="checkbox"/> S A SET ASIOE <input type="checkbox"/> DIRECT MINORITY AWARD		
		4. LOCATION OF CONTRACT PERFORMANCE IF OTHER THAN ITEM 1		
5. PROGRAM TITLE AND SHORT DESCRIPTION OF CONTRACT REQUIREMENT		6. CONTRACT DOLLAR VALUE		
		7. TYPE CONTRACT <div style="display: flex; justify-content: space-between;"> <div> <input type="checkbox"/> FPR <input type="checkbox"/> CPFF <input type="checkbox"/> FFP <input type="checkbox"/> CPIF </div> <div> <input type="checkbox"/> FP <input type="checkbox"/> FPI <input type="checkbox"/> CPAF <input type="checkbox"/> OTHER </div> </div>		
<p>NOTE: Evaluate contract performance factors listed below as satisfactory or unsatisfactory. All unsatisfactory ratings required explanation addressing applicable review questions found in reporting guide/checklist (ESDR 178-I, Atch 2). Attach narration to this form.</p>				
8. AREAS OF EVALUATION		SAT	UNSAT	N/A
A. ENGINEERING/DESIGN AND TEST				
B. CONFIGURATION MANAGEMENT				
C. COST/FINANCIAL MANAGEMENT				
D. DATA MANAGEMENT				
E. MANUFACTURING				
F. QUALITY ASSURANCE/CONTROL				
G. LOGISTICS SUPPORT MANAGEMENT				
H. HARDWARE REQUIREMENT				
I. SOFTWARE REQUIREMENT				
J. RELIABILITY				
K. MANAGEMENT				
L. MAINTAINABILITY				
M. CONTRACTING				
N. OTHER AREA(S) OF PERFORMANCE				
9. THE ABOVE EVALUATION REVEALS CONTRACTOR PERFORMANCE WAS/WAS NOT IN COMPLIANCE WITH THE CONTRACT				
			WAS	WAS NOT
TECHNICAL (Performance)				
COST CONTROL				
SCHEDULES (Line Item Deliveries/Contract Milestones)				
REMARKS				
10. TYPE NAME OF PROGRAM/PROJECT MANAGER		SIGNATURE		OFFICE SYMBOL/DATE
11. TYPE NAME OF MISSION DEPUTY		SIGNATURE		OFFICE SYMBOL/DATE
12. TYPE NAME OF ASSIGNED PCO		SIGNATURE		OFFICE SYMBOL/DATE
13. TYPE NAME OF CONTRACTING DIRECTOR		SIGNATURE		OFFICE SYMBOL/DATE

Appendix Z

Extract from Air Force Regulation 70-15, Electronic Systems Division,
Supplement 1

2-7c(2) (Added). At ESD, the preferred method of treating relevant present and past performance is as a general consideration. Present and past performance will not be considered in the scoring or assessment by the SSEB/SSAC under any areas, but instead will be documented and presented separately to the SSA for his/her overall consideration in deciding which offeror is best capable of satisfying the Government's requirements. The RFP will request offerors and their major subcontractors to identify all active and completed prime contracts or subcontracts to identify all active and completed prime contracts or subcontracts (Government) performed by them (same division or cost center) with a face value of \$25 million or more and an award date of up to five years before the solicitation date and require them to complete a questionnaire on each (see Attachment 11A (added), this supplement for sample*). Instruct offerors that if the total number of contracts exceeds fifteen (15) (10 for major subcontractors), they shall complete a questionnaire on their 15 most recent contracts only. If offerors do not have 15 in the \$25M or more dollar range, then they shall be instructed to submit information on contracts in descending order (based on dollar value) until the minimum quantity of 15 is met. When requested by SSEB Chairperson, PKP (SSS) will obtain a current listing of all active AFSC contracts identified in the AMIS data base for each offeror submitting proposals. It is the SSEB Chairperson's responsibility to ensure that this list is reviewed along with information provided by offerors; obtain and review copies of Contractor Performance Evaluation Reports (AFSC Form 1364) and other performance information from the SSS files; make contact with cognizant Government (i.e., program office, AFPRO/CMD, DCAS) individuals to obtain their input regarding the technical, cost and schedule performance on contracts provided by the offerors in their proposal as well as on additional contracts not identified by the offerors (prime and major subcontractors). See Attachment 11B (added), this supplement, for sample* questionnaire to be used, and document the results in Volume V of the SSEB Report. The report must state objective facts regarding offeror's technical, cost and schedule performance on contracts represented. SSEB Chairpersons will also ensure that contact is made with all AFSC product divisions to specifically identify major subcontract efforts within HQ AFSC. PCOs will discuss any unfavorable findings with the respective offerors during face-to-face discussions and allow each offeror the opportunity to provide any additional, relevant information on the matter. Absence of relevant present or past performance will not, in itself, result in a negative evaluation. A copy of all present and past performance questionnaires completed by offerors, program offices, AFPROs, DCASs, etc., will be incorporated as an addendum to Volume V of the SSEB Report. Care should be taken to ensure that any information relative to present or past performance identified during a PAS or EPAS is incorporated into the evaluation of present and past performance (see also Attachment 5, paragraph f, this supplement).

* These questionnaires are provided as samples only and must be tailored to correspond with your program's award criteria, i.e., Areas, Items set forth in Section M of the RFP.

AFR 70-15/ESD Sup 1

(SAMPLE)
FOR OFFICIAL USE ONLY
SOURCE SELECTION SENSITIVE

PRESENT AND PAST PERFORMANCE QUESTIONNAIRE

Request you review this questionnaire and provide frank, concise comments regarding your performance on the contract identified in C. below.

RETURN TO: HQ ESD (Office Symbol/Attn:)
Hanscom AFB, MA 01731

- A. OFFEROR NAME (Company/Division): _____
- B. PROGRAM TITLE: _____
- C. CONTRACT NUMBER: _____
- D. BRIEF DESCRIPTION OF EFFORT: (Please highlight portions considered most relevant to current acquisition)

- E. TYPE OF CONTRACT: _____
- F. PERIOD OF PERFORMANCE: _____
- G. ORIGINAL CONTRACT \$ VALUE: _____
1. CURRENT \$ VALUE: _____
2. ESTIMATE AT COMPLETION _____
(If different from current value, please explain) _____
- H. ORIGINAL COMPLETION DATE: _____
1. CURRENT SCHEDULE: _____
2. ESTIMATE AT COMPLETION: _____
3. HOW MANY TIMES CHANGED: _____
- I. WILL YOU/DID YOU MEET OR EXCEED ALL INITIAL TECHNICAL REQUIREMENTS? _____
1. IDENTIFY WHICH REQUIREMENTS (IF ANY) WILL BE/WERE NOT MET: _____
2. ARE/WERE THOSE REQUIREMENTS WHICH WILL BE/WERE MET, THE SAME AS ORIGINALLY REQUIRED OR AS CHANGED? _____
- J. 1. BUYING OFFICE ADDRESS/TELEPHONE NUMBER/POINT OF CONTACT: _____
2. ACO ADDRESS/TELEPHONE NUMBER/POINT OF CONTACT: _____
- K. USE THIS SPACE TO ADDRESS ANY TECHNICAL (OR OTHER) AREA OF CONCERN CONSIDERED UNIQUE: _____

SOURCE SELECTION SENSITIVE
FOR OFFICIAL USE ONLY

Attachment 11A (Added)

(SAMPLE)
FOR OFFICIAL USE ONLY
SOURCE SELECTION SENSITIVE

PRESENT AND PAST PERFORMANCE QUESTIONNAIRE

Request you review this questionnaire and provide frank, concise comments regarding your overall assessment of contractor's performance on the contract identified in C. below. Please do not give Yes or No answers, rather provide narrative/rationale for your assessment. If more space is required, please use reverse side of this form or attach additional sheets.

RETURN TO: HQ ESD (Office Symbol/Attn:)
Hanscom AFB, MA 01731

- A. OFFEROR NAME (Company/Division): _____
- B. PROGRAM TITLE: _____
- C. CONTRACT NUMBER: _____
- D. BRIEF DESCRIPTION OF EFFORT: (Please highlight portions considered most relevant to current acquisition)

- E. TYPE OF CONTRACT: _____
- F. PERIOD OF PERFORMANCE: _____
- G. ORIGINAL CONTRACT \$ VALUE: _____
1. CURRENT \$ VALUE: _____
2. ESTIMATE AT COMPLETION: _____
(If different from current value, please explain)

- H. Please discuss any positive or negative issues associated with the contractor's performance in the following categories: Were all initial requirements met or exceeded: Which ones were or were not? Were all requirements the same as originally required? If not, how changed? If the contract is presently being performed, do you expect all initial requirements will be met? If not, which ones do you expect to change?
1. RELIABILITY/MAINTAINABILITY/PRODUCIBILITY: _____
2. SOFTWARE: _____
3. LOGISTICS (including Quality): _____
4. OTHER: _____
5. OVERALL ASSESSMENT: _____
COST: _____
SCHEDULE: _____
PERFORMANCE: _____

SOURCE SELECTION SENSITIVE
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Attachment 11B (Added)

Glossary

Abbreviations

AF

Air Force

AFALC

Air Force Acquisition Logistics Center

AFSC

Air Force Systems Command

AG, FPP

Adjutant General, Field Printing Plant

AMC

Army Materiel Command

AMC-R

Army Materiel Command Regulation

AMC FAR SUP

Army Materiel Command Federal Acquisition Regulation Supplement

CBD

Commercial Business Daily

CPEP

Contractor Performance Evaluation Program

CPM

Critical Path Method

CSI

Competition Sensitive Information

DA

Department of the Army

DCSP

Deputy Chief of Staff for Procurement

DLSIE

Defense Logistic Studies Information Exchange

DOD

Department of Defense

DODD

Department of Defense Directive

EOC
Errors, Omissions, and Clarification

ESD
Electronics Systems Division

FAR
Federal Acquisition Regulation

GSA
General Services Administration

HB
Handbook

HQ, AMC
Headquarters, U.S. Army Materiel Command

HQ, DA
Headquarters, Department of the Army

IFPP
Instructions for Proposal Preparation

JD
Job Description

KO
Contracting Officer

LHX
Light Helicopter Family

LL
Lessons Learned

MACOM
Major Command

MAM
Materiel Acquisition Management

MIS
Management Information System

MMI
MSFC Management Instruction

MOS
Military Occupation Specialty

MSC
Major Subordinate Command

MSFC
Marshall Space Flight Center

NASA
National Aeronautics and Space Administration

PAS
Pre-award Survey

PC
Personal Computer

PERT
Program Evaluation and Review Technique

PM
Program/Project/Product Manager

PMO
PM Office

PPPT
Present and Past Performance Team

POV
Privately Owned Vehicle

RFP
Request for Proposal

SSA
Source Selection Authority

SSAC
Source Selection Advisory Council

SEB
Source Evaluation Board

SEB/PEB
Selection Evaluation Board/Performance Evaluation Board

SSEB
Source Selection Evaluation Board

SOW
Scope of Work

SSO
Source Selection Officer

SSP
Source Selection Plan

R

Defense Systems Management College Library



36026

